FSA Modernization Partner

NSLDS II Reengineering Screens Detail Design: Enrollment

DRAFT

Version 1.0

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Document Control

Version Number	Description	Release Date	Author
1.0	Initial Issue	09/30/2002	Sunil Malhotra

1   General Information

1.1   Background

The National Student Loan Data System (NSLDS) was established as part of the Higher Education Act of 1965, as amended, to provide a comprehensive repository of information about Title IV recipients and their loans, grants, lenders, guaranty agencies, servicers, and schools. Currently, NSLDS is hampered by a number of challenges related to discrepancies between the quality and timeliness of data feeds and the system of record, and its operating costs.

Given these challenges, a project to modernize the system – NSLDS Reengineering – has been undertaken to improve financial and data integrity, reduce operational costs, and improve customer satisfaction. At the heart of the design for a reengineered NSLDS solution are five "big ideas" for radically changing the underlying processes, data structures, and technical platforms supporting the existing system:

- Data Warehousing
- Internal FSA (Federal Student Aid) Direct Access
- Outsourced Enrollment Tracking
- Financial Partner Data Feed Reengineering
- Common Record Extension

The first phase of the NSLDS Reengineering effort is called NSLDS II. NSLDS II Release 1 will focus on the Data Warehousing and Internal FSA Direct Access opportunities, as well as assessing ways to support existing requirements through NSLDS II or other modernized systems. Later releases of work will focus on the remaining three ideas and enhancements.

1.2   NSLDS Points of Entry Overview

There are three main applications in the legacy NSLDS technical architecture that serve as the gateway for accessing and modifying Title IV data online. The applications include the Financial Aid Professional (FAP) website, Student Access Financial Aid Review website, and the Customer Information Control System (CICS). As part of the NSLDS II replatforming initiative, CICS will be retired and its functionality will be transferred to the FAP website. The User Interface Inventory Matrix **(Reference Appendix B)** documents a comprehensive list of screens for the FAP and Student Access websites and the NSLDS functional area(s) they support.

The FAP website, which can be found at http://www.nsldsfap.ed.gov, will be the main user access point for NSLDS II data by Department of Education (ED) personnel, guaranty agencies (GAs), lenders, and schools. It provides support for users by tracking the financial aid and enrollment history for Title IV aid recipients, organizational information for Title IV aid financial partners, access to predefined reports with the ability of executing ad hoc queries, and the monitoring of student transfers. A lender or school may also allow a servicer to access the website and provide online updates on their behalf. Each user must be registered with the website and can only log on with a valid User ID and Password.

The two major areas of enhancement for the FAP website will consist of the following:

1. Reengineering the existing reporting architecture
2. Retiring CICS

Reengineering the Reporting Architecture
Reports are currently accessed through the Main Menu, which allows users to execute predefined reports and receive the results either in their SAIG mailbox or download them directly (depending on the users permission level). If a user requires data that is not supported by a predefined report, they are limited to either developing their own query or contacting the support center to develop a query for them. In order to create a query, a user must be familiar with Structured Query Language (SQL), which is the code used to develop a query, the NSLDS data model, whose data elements are used within the SQL, and the Query Management Facility (QMF) tool, which is the application used to execute the query. In order to empower users and improve the customer experience for executing ad hoc queries, a MicroStrategy reporting tool will be implemented. The MicroStategy reporting tool is a commercial off-the-shelf (COTS) package that has the capability to filter and analyze massive volumes of data to the transaction level. In addition, the MicroStrategy application server has a full range of query optimization algorithms designed to ensure that data is extracted from a database in the most efficient and least demanding way.

The new ad hoc reporting functionality will continue to be accessible through the Main Menu and Report screens in the FAP website. The detailed design regarding the report screen changes can be found in the Report Detail Design document.

Retiring CICS
CICS is IBM software that allows ED personnel to connect to the NSLDS mainframe and perform online transactions. Users have the ability to update or access data online from ED Headquarters or Regional offices. The majority of the CICS functionality has already been transitioned to the FAP website in response to user demand for a more user-friendly and

flexible tool. The remaining functionality, which includes screens from the System Administration, Default Rate, and Student Status Confirmation menus will be transferred to the FAP website as part of the NSLDS II reengineering initiative. This will complete the transition to the FAP website by the legacy contractor, therefore, clearing the path for retiring CICS. Once CICS has been retired, the FAP website will serve as the default application for ED personnel to access NSLDS II data.

The Student Access website, which can be accessed at http://www.nslds.ed.gov, allows students to securely view and track their financial aid history. They have the ability to view their Title IV loans at a summary or at a detailed loan level. The summary loan level data allows a student to view all Title IV loans they are responsible for in a consolidated format. The detailed loan level data tracks the history of each loan throughout its lifecycle.   Each student must be registered with the website and must have a valid User ID and FSA PIN to logon. This is a read only website and does not have any update capabilities associated with it.

The following diagram displays the CICS application being retired due to functionality being transferred to the FAP website during the NSLDS replatforming initiative.

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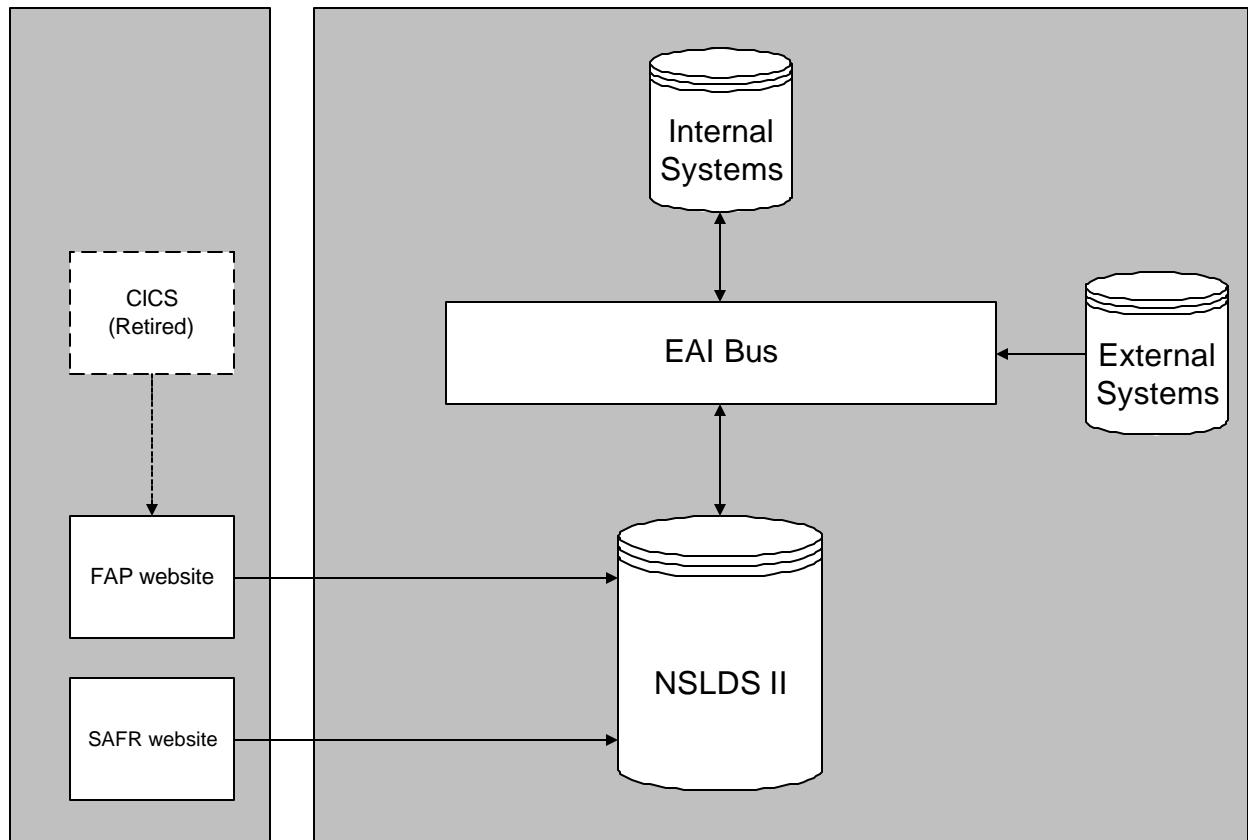
Figure 1, NSLDS II User Interface Diagram

1.3   Screens Detail Design Document Layout

The screens detail design document provides a blueprint for developing each screen that will support the FAP and Student Access websites. The screens detail design document is separated into the following modules:

Financial Aid Professional website

- Login-Menu – Contains the detail design for the Logion-Menu screens.
- Financial Aid– Contains the detail design for the Financial Aid screens.
- Enrollment – Contains the detail design for the Enrollment screens.
- Organization – Contains the detail design for the Organization screens.
- Reports – Contains the detail design for the Reports screens.
- Student Transfer Monitoring – Contains the detail design for the Student Transfer Monitoring screens.

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- Support – Contains the detail design for the Support screens.
- Appendix A – Global Attributes for FAP Website– Lists common icons that may be displayed in the Login-Menu, Financial Aid, Enrollment, Organization, Student Transfer Monitoring, and Support modules.

Student Access Financial Aid Review website

- Student Access– Contains the detail design for the Student Access screens

This detail design document will contain the following information for each screen:

1.4   Name of the Screen

Description	Defines the purpose of the screen.
New or Existing	New – Identifies the screen is new to the website. Existing- Identifies the screen previously existed on the website.
User Group (Screen Level)	Identifies which user group will have access to the screen. The intent of this section is not to define the security groups for the screens.
Requirements Traceability	Maps the detail design for the screen to the detailed requirements.
Reference(s)	Lists references that provide additional detail for each screen.
Business Object	Lists the business object the screen will utilize for development purposes.

1.4.1   Software Unit Logic

ASP File Name:	Lists the ASP file name for each screen that was used if the screen previously existed.
Pre-Status:	Lists the screen names and their links that will allow a user to access a specific screen.
Post-Status:	Lists the screen names that are accessible from a specific screen (and the links that will allow a user to navigate to that screen).
Gif Name:	List of Gif files used in the screen.

1.4.2   Design Details

The following screenshot highlights the functionality of the screen:

Provides a design layout of the screen.

1.4.3   Screen Functionality

Name of the Data Element on the screen	
Element	Type of data element (e.g., label, pushbutton, checkbox, textbox).
Definition/Business Rules	Description of the data element and any business rules associated with it.
Actions to be performed	Describes any action associated with the data element.
User Group (Element Level)	Identifies which user group will have access to the data element. The intent of this section is not to define the security groups for the data element.
Validation	*Condition*: Describes the validation that will be performed. *Message*: Describes the message that will appear to the user. *Location*: Describes where the validation will occur (i.e., Client or Server) *Additional Information*: Describes any additional information related to the validation (e.g., gif files appearing with error messages).

Note:

Section 508 of the Rehabilitation Act of 1998 mandates a website accessibility review. Section 508 requires that electronic and information technology developed, procured, maintained, or used by Federal government agencies must be accessible to persons with disabilities. The system must allow a person with a disability to have comparable access to and use of information as a person without a disability.

The Assistive Technology Group within the FSA Technology Center is responsible for performing Section 508 reviews. During the Detailed Design and Build phases, the NSLDS II

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Modernization Partner team will work with the Assistive Technology Group to verify that the design of the online screens meets Section 508 requirements. The FAP and Student Access websites are currently not Section 508 compliant. The formal accessibility review for NSLDS II will then be conducted during the Test phase.

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2 Screen Workflow

2.1 Master List of Screens

The following table provides a list of screens for the Enrollment module of the FAP website for NSLDS II. The table includes the section the screen is explained, screen name, whether the screen is new or existing and a description of the screen.

Section	Screen Name	New/ Existing	Description
3.1	Enrollment Summary	Existing	Provides an overview of a student's most recent status at every school where enrollment has been reported for that student.
3.2	Student/PLUS Borrower Name Search	Existing	Allows a user to search for records in the NSLDS II database by complete or partial name, rather than SSN. A user can search by first name, last name, first and last name, and by a partial or exact match type.
3.3	Enrollment Detail	Existing	Displays a detailed history of a student's enrollment status at one or more schools.
3.4	Enrollment Timeline	Existing	Displays a chronological view of a student's enrollment history. This page is intended to help users, especially lenders, see all of a student's enrollment statuses at a given time in the past and how long those statuses remained in effect.
3.5	Enrollment Maintenance	Existing	Allows school users to update the enrollment information for students attending their school.
3.6	Enrollment Add	Existing	Allows school users to retrieve student records, so they can update enrollment information for those students on the Enrollment Maintenance page.
3.7	Enrollment Update	Existing	Allows school users to retrieve enrollment information for students

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Section	Screen Name	New/ Existing	Description
			attending their school so they can update that information on the Enrollment Maintenance page.
3.8	Enrolment Reporting Schedule	Existing	Displays a user profile as well as current and past schedules for organizations that report or receive information about the enrollment status of students receiving federal student aid. The current schedule extends one year into the future. The past schedule extends one year into the past.
3.9	Enrollment Reporting Schedule Create	Existing	Allows a user to create a new schedule for their organization to receive enrollment status files from the NSLDS II.
3.10	Enrollment Reporting Schedule Create Confirm	Existing	Allows a user to confirm the new enrollment reporting schedule.
3.11	Enrollment Reporting Schedule Modify	Existing	Allows a user to modify their organization's current schedule for receiving enrollment status files from NSLDS II.
3.12	Enrollment Reporting Schedule Modify Confirm	Existing	Allows a user to confirm the modification of the new enrollment reporting schedule.

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2.2 Update/Inquiry Diagram

The following diagram displays screens that contain update functionality to the Enterprise Data Warehouse (EDW), as well as, screens that contain inquiry capabilities from the Data Mart:
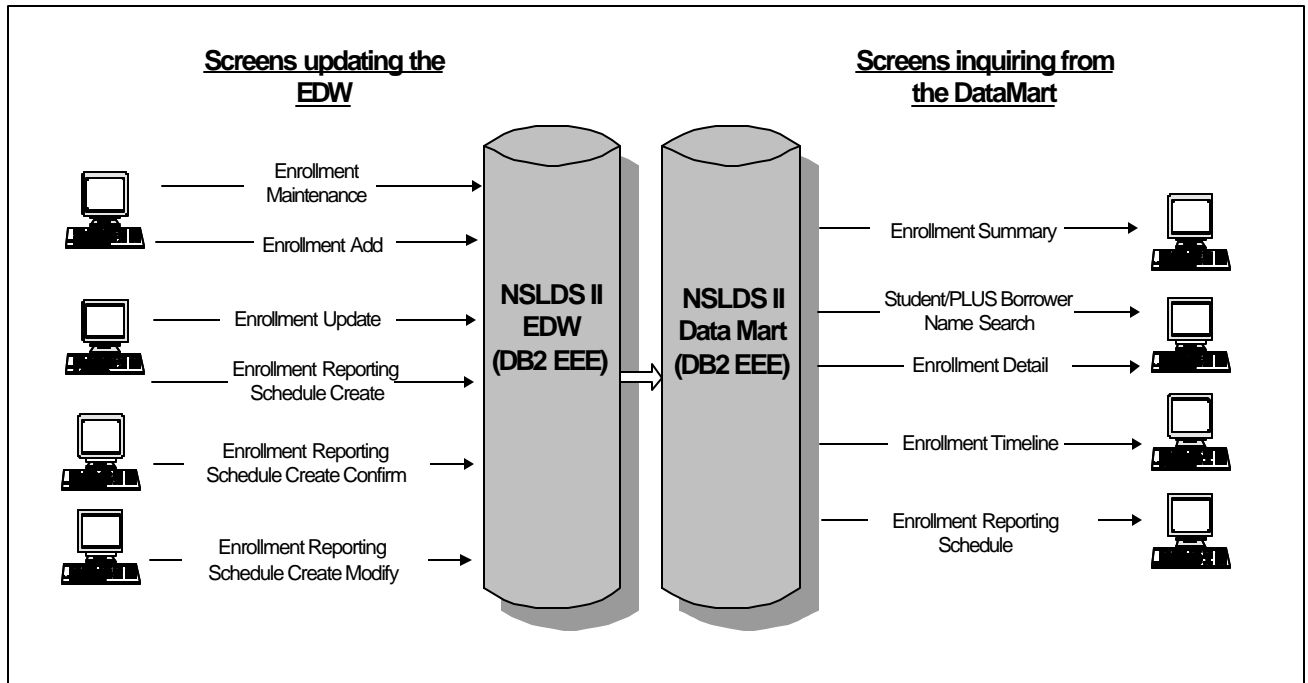
Figure 3, NSLDS II FAP Enrollment Update/Inquiry

3 Screen Details

3.1 Enrollment Summary

Description	Provides an overview of a student's most recent status at every school where enrollment has been reported for that student.
New or Existing	Existing
User Group (Screen Level)	$LENDSV, $LENDER, $SCHDPC, $PICTEL, $PICLET, $SCHSCR, $STAGNT, $SCHFAT, $CSC, $GAINQ, $ED
Requirements Traceability	1.028
Reference(s)	ENSUM.ASP
Business Object	Student, Plus Borrower, School, GA, Lender

3.1.1 Software Unit Logic

ASP File Name:	ENSUM.asp
Pre-Status:	This screen is accessible from all screens on the Financial Aid Professionals website except from the following screens (depending on user access privileges): • System Log On • Privacy Act • Help • Contact Us • Frequently Asked Questions • Download Help • Security
Post-Status:	This screen allows a user to navigate to any of the following screens (depending on user access privileges): • Enrollment Add (Link: Enrollment Add) • Enrollment Update (Link: Enrollment Update) • Enrollment Reporting Schedule (Link: Enrollment Reporting Schedule) • Enrollment Detail (Link: Active Bullet Number)

	• Enrollment Timeline (Link: Enrollment Timeline)
	• Enrollment Maintenance (Link: Enrollment Maintenance)
	• System Log On (Link: Logoff Icon)
	• Contact Us (Link: Contact Icon)
	• Menu (Link: Menu Tab)
	• Loan History (Link: Aid Tab)
	• Organization Contact List (Link: Org Tab)
	• Reports (Link: Reports Tab)
	• Transfer Monitoring List (Link: Menu Tab)
	• External Contact List (Link: Support Tab)
	• Privacy Act (Link: Privacy Act)
	• Student/PLUS Borrower Name Search (Pushbutton: Name Search)
Gif Name:	None.

3.1.2   Design Details

The following screenshot highlights the functionality of the Enrollment Summary screen.

Figure 4, Enrollment Summary

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3.1.3   Screen Functionality

The following screenshot highlights the functionality of the Enrollment Summary screen.

Enrollment Summary	
Element	Link (Deactivated)
Definition/Business Rules	Allows a user to navigate to the Enrollment Summary screen. This link is deactivated when the user is in the Enrollment Summary screen.
Actions to be performed	None.
User Group (Element Level)	TBD
Validation	None.

Enrollment Add	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Enrollment Add screen.
Actions to be performed	When clicked, the Enrollment Add screen appears.
User Group (Element Level)	TBD
Validation	None.

Enrollment Update	
Element	Link (Deactivated)
Definition/Business Rules	Allows a user to navigate to the Enrollment Update screen.
Actions to be performed	When clicked, the Enrollment Update screen appears.
User Group (Element Level)	TBD
Validation	None.

Enrollment Reporting Schedule	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Enrollment Reporting Schedule screen.
Actions to be performed	When clicked, the Enrollment Reporting

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Enrollment Reporting Schedule	
	Schedule screen appears.
User Group (Element Level)	TBD
Validation	None.

SSN	
Element	Textbox
Definition/Business Rules	Allows a user to enter a Social Security Number. SSN must be entered in a "123456789" or "123-45-6789" format.
Actions to be performed	As the user enters their SSN, it is displayed in the textbox in editable format.
User Group (Element Level)	TBD
Validation	None.

First Name	
Element	Textbox
Definition/Business Rules	Allows a user to enter a First Name. First Name can be up to 12 characters.
Actions to be performed	As the user enters the First Name, it is displayed in the textbox in editable format.
User Group (Element Level)	TBD
Validation	None.

DOB	
Element	Textbox
Definition/Business Rules	Allows a user to enter a Date of Birth. DOB must be entered with a "MMDDCCYY", "MM/DD/CCYY" or "MM-DD-CCYY" format.
Actions to be performed	As the user enters their Date of Birth, it is displayed in the textbox in editable format.
User Group (Element Level)	TBD
Validation	None.

Retrieve	
Element	Pushbutton
Definition/Business Rules	Allows a user to retrieve loan information on a specific student based on the search criteria

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Retrieve	
	entered in the SSN, First Name, and DOB fields.
Actions to be performed	By clicking on the pushbutton, validation is performed. If there are no errors and students matching the criteria are identified, the Enrollment Summary is displayed for each student. If there are errors, the appropriate error message is displayed. If there are no errors and no students are found, a message indicating that no records are found.
User Group (Element Level)	
Validation	• *Condition*: If the user has entered valid data in the SSN field or in the SSN, First Name, and DOB fields, the data for that particular student will be displayed in the Enrollment Summary screen. *Message*: None. *Location*: Server *Additional Information*: None. • *Condition*: A user has entered a valid SSN but an invalid First Name and DOB. *Message*: Match on SSN. No match on DOB & First Name. The PLUS SSN was not found. *Location*: Client *Additional Information*: None. • *Condition*: A user has entered an invalid SSN. *Message*: The Student SSN was not found. The PLUS SSN was not found. *Location*: Server *Additional Information*: None. • *Condition*: A user has entered a SSN and First Name or DOB. *Message*: Please enter either all 3 identifiers or SSN.

Retrieve	
	Location: Client *Additional Information*: The label font color for the field whose data was not provided becomes red. • *Condition*: A user enters a SSN less than 9 characters. *Message*: Please enter a 9 digit numeric SSN. *Location*: Client *Additional Information*: The label font color for the SSN field becomes red. . • *Condition*: A user has entered a valid SSN and First Name and an invalid DOB. *Message*: Please enter the Date of Birth in the MMDDCCYY format. *Location*: Client *Additional Information*: The label font color for the DOB field becomes red.

Name Search	
Element	Pushbutton
Definition/Business Rules	Allows a user to navigate to the Student/PLUS Borrower Name Search screen.
Actions to be performed	By clicking on the pushbutton, the user is directed to the Student/PLUS Borrower Name Search screen.
User Group (Element Level)	TBD
Validation	None.

John A Smith	
Element	Label
Definition/Business Rules	Displays the Name of a borrower whose enrollment information is displayed. The history icon will appear next to the name if a user has had multiple names in the past.

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John A Smith	
Actions to be performed	The name of the borrower is automatically displayed.
User Group (Element Level)	TBD
Validation	None.

123-45-6789	
Element	Label
Definition/Business Rules	Displays the Social Security Number of a borrower whose enrollment information is displayed. The history icon will appear next to the SSN if a user has had multiple SSNs in the past.
Actions to be performed	The SSN of the borrower is automatically displayed.
User Group (Element Level)	TBD
Validation	None.

01/01/1980	
Element	Label
Definition/Business Rules	Displays the Date of Birth of a borrower whose enrollment information is displayed.
Actions to be performed	The DOB of the borrower is automatically displayed.
User Group (Element Level)	TBD
Validation	None.

Enrollment Detail	
Element	Pushbutton
Definition/Business Rules	Allows a user to navigate to the Enrollment Detail screen.
Actions to be performed	By clicking on the pushbutton, the user is directed to the Enrollment Detail screen.
User Group (Element Level)	TBD
Validation	None.

Enrollment Timeline

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Enrollment Timeline	
Element	Pushbutton
Definition/Business Rules	Allows a user to navigate to the Enrollment Timeline screen.
Actions to be performed	By clicking on the pushbutton, the user is directed to the Enrollment Timeline screen.
User Group (Element Level)	TBD
Validation	None.

Enrollment Maintenance	
Element	Pushbutton
Definition/Business Rules	Allows a user to navigate to the Enrollment Maintenance screen.
Actions to be performed	By clicking on the pushbutton, the user is directed to the Enrollment Maintenance screen.
User Group (Element Level)	TBD
Validation	None.

1	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Enrollment Detail screen.
Actions to be performed	By clicking on the link, the user is directed to the Enrollment Detail screen. Detailed enrollment information appears in the Enrollment Detail screen for the selected row.
User Group (Element Level)	TBD
Validation	None.

School Name	
Element	Label
Definition/Business Rules	Displays the name of the school at which enrollment was reported for the student. A user can click on the school name to link to the school's Organization Contact List page. If the school itself did not report the information

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School Name	
	about the student's enrollment at this school, a small warning icon appears after the school's name.
Actions to be performed	The School Name is automatically displayed.
User Group (Element Level)	TBD
Validation	None.

OPEID	
Element	Label
Definition/Business Rules	Displays the eight-digit Office of Postsecondary Education Identification number for the school at which enrollment was reported.
Actions to be performed	The OPEID is automatically displayed.
User Group (Element Level)	TBD
Validation	None.

Most Recent Status	
Element	Label
Definition/Business Rules	Displays the status most recently reported for the student at that school.
Actions to be performed	The most recent status is automatically displayed.
User Group (Element Level)	TBD
Validation	None.

Eff. Date	
Element	Label
Definition/Business Rules	
Actions to be performed	The effective date of the borrower is automatically displayed.
User Group (Element Level)	TBD
Validation	None.

ACD	
Element	Label

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ACD	
Definition/Business Rules	Displays the date when the student completed, or was expected to complete, his or her studies. The following special rules apply: • The NSLDS sets Anticipated Completion Date to 01/01/0001 for Enrollment Status 'Z' (No Record Found), 'W (Withdrawn), and 'L' (Less Than Half Time). • The NSLDS sets Anticipated Completion Date to 12/31/9999 for Enrollment Status 'D' (Deceased). • The NSLDS sets Anticipated Completion Date equal to Effective Date for Enrollment Status 'G' (Graduated).
Actions to be performed	The ACD is automatically displayed.
User Group (Element Level)	TBD
Validation	None.

Certification Date	
Element	Label
Definition/Business Rules	Displays the date a school certified the enrollment information. Sources other than schools do not certify enrollment data. So if an Enrollment Summary record is based on non-school data, the Certification Date and Cert. Method boxes for that record will display 'N/A' (Not Applicable).
Actions to be performed	The Certification Date is automatically displayed.
User Group (Element Level)	TBD
Validation	None.

Cert. Method	

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Cert. Method	
Element	Label
Definition/Business Rules	Displays the Certification method the school used to certify the enrollment information. • *School Batch*—The school certified the enrollment information through the batch enrollment reporting process. • *NSLDS Web*—The school certified the enrollment information using the Enrollment Maintenance page. Sources other than schools do not certify enrollment data. So if an Enrollment Summary record is based on non-school data, the Certification Date and Cert. Method boxes for that record will display 'N/A' (Not Applicable).
Actions to be performed	The Cert. Method is automatically displayed.
User Group (Element Level)	TBD
Validation	None.

3.2   Student/PLUS Borrower Name Search

Description	Allows a user to search for records in the NSLDS II database by complete or partial name, rather than SSN. A user can search by first name, last name, first and last name, and by a partial or exact match type.
New or Existing	Existing
User Group (Screen Level)	$PICLET, $PICTEL, $CSC,$ ED
Requirements Traceability	1.014
Reference(s)	NAMESRCH.ASP
Business Object	Student, Plus Borrower

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3.2.1   Software Unit Logic

ASP File Name:	namesrch.asp
Pre-Status:	This screen is accessible from the following screens (depending on user access privileges): • Loan History (Pushbutton: Name Search) • Overpayment History (Pushbutton: Name Search) • Pell Grant History (Pushbutton: Name Search) • Student Access Interface (Pushbutton: Name Search) • Enrollment Summary (Pushbutton: Name Search) • Enrollment Detail (Pushbutton: Name Search) • Enrollment Timeline (Pushbutton: Name Search)
Post-Status:	This screen allows a user to navigate to any of the following screens (depending on user access privileges): • Enrollment Summary (Link: Enrollment Summary) • Enrollment Add (Link: Enrollment Add) • Enrollment Update (Link: Enrollment Update) • Enrollment Reporting Schedule (Link: Enrollment Reporting Schedule) • System Log On (Link: Logoff Icon) • Contact Us (Link: Contact Icon) • Menu (Link: Menu Tab) • Loan History (Link: Aid Tab) • Organization Contact List (Link: Org Tab) • Reports (Link: Reports Tab) • Transfer Monitoring List (Link: Menu Tab) • External Contact List (Link: Support Tab) • Privacy Act (Link: Privacy Act)
Gif Name:	The following graphical objects may appear on this screen: • Error.gif • Warn.gif • Info.gif • Help.gif • Nextgroup.gif • Prevgroup.gif

3.2.2 Design Details

The following screenshot highlights the functionality of Student/PLUS Borrower Name Search screen.

Figure 5, Student/PLUS Borrower Name Search

3.2.3 Screen Functionality

The following section describes each object on the screen and the functionality behind the object.

Enrollment Summary

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Enrollment Summary	
Object	Link
Definition/Business Rules	Allows a user to navigate to the Enrollment Summary screen.
Actions to be performed	When clicked, the Enrollment Summary screen appears.
User Group (Element Level)	TBD
Validation	None.

Enrollment Add	
Object	Link
Definition/Business Rules	Allows a user to navigate to the Enrollment Add screen.
Actions to be performed	When clicked, the Enrollment Add screen appears.
User Group (Element Level)	TBD
Validation	None.

Enrollment Update	
Object	Link
Definition/Business Rules	Allows a user to navigate to the Enrollment Update screen.
Actions to be performed	When clicked, the Enrollment Update screen appears.
User Group (Element Level)	TBD
Validation	None.

Enrollment Reporting Schedule	
Object	Link
Definition/Business Rules	Allows a user to navigate to the Enrollment Reporting Schedule screen.
Actions to be performed	When clicked, the Enrollment Reporting Schedule screen appears.
User Group (Element Level)	TBD
Validation	None.

Last Name	
Object	Textbox

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Last Name	
Definition/Business Rules	Allows a user to enter last name of a Student/PLUS Borrower. The textbox holds up to 35 characters.
Actions to be performed	As the user enters their name, it is displayed in the textbox in editable format.
User Group (Element Level)	TBD
Validation	None.

Match Type (Last Name)	
Object	Dropdown Box
Definition/Business Rules	Allows a user to specify the type of search performed on a Student/PLUS Borrower last name. The different options are (displayed in this order): • Exact • Partial
Actions to be performed	When the user selects an option, the option is displayed in the dropdown box.
User Group (Element Level)	TBD
Validation	None.

First Name	
Object	Textbox
Definition/Business Rules	Allows a user to enter first name of a Student/PLUS Borrower. The textbox holds up to 12 characters.
Actions to be performed	As the user enters their name, it is displayed in the textbox in editable format.
User Group (Element Level)	TBD
Validation	None.

Match Type (First Name)	
Object	Dropdown Box
Definition/Business Rules	Allows a user to specify the type of search

Match Type (First Name)	
	performed on a Student/PLUS Borrower first name. The different options are (displayed in this order): • Exact • Partial • Aliases
Actions to be performed	When the user selects an option, the option is displayed in the dropdown box.
User Group (Element Level)	TBD
Validation	None.

Search For	
Object	Dropdown Box
Definition/Business Rules	Allows a user to specify the type of search performed. The different options are (displayed in this order): • Student Names Only • PLUS Borrower Names Only • Student and PLUS Borrower Names
Actions to be performed	When the user selects an option, the option is displayed in the dropdown box.
User Group (Element Level)	TBD
Validation	None.

Retrieve	
Object	Pushbutton
Definition/Business Rules	Allows a user to retrieve information on Student/PLUS Borrower(s) that match the specified search criteria (SSN, First Name, and DOB).
Actions to be performed	By clicking on the pushbutton, the Matching Names table will display. The columns in the table are: Last Name, First Name, MI, DOB, SSN, Type, Cur.
User Group (Element Level)	TBD

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Retrieve	
Validation	TBD

3.3 Enrollment Detail

Description	Displays a detailed history of a student's enrollment status at one or more schools.
New or Existing	Existing
User Group (Screen Level)	$LENDER, $LENDSV, $SCHDPC, $PICTEL, $PICLET, $GAINQ, $ED, $SCHSCR, $SCHFAT, $STAGNT, $CSC
Requirements Traceability	1.029
Reference(s)	EDNET.ASP
Business Object	Student, Plus Borrower, School, GA, Lender

3.3.1 Software Unit Logic

ASP File Name:	endet.asp
Pre-Status:	This screen is accessible from the following screens (depending on user access privileges): • Enrollment Summary (Link: Active Bullet Number, Pushbutton: Enrollment Detail)
Post-Status:	This screen allows a user to navigate to any of the following screens (depending on user access privileges): • Enrollment Summary (Link: Enrollment Summary) • Enrollment Add (Link: Enrollment Add) • Enrollment Update (Link: Enrollment Update) • Enrollment Reporting Schedule (Link: Enrollment Reporting Schedule) • Student/PLUS Borrower Name Search (Pushbutton: Name Search) • System Log On (Link: Logoff Icon) • Contact Us (Link: Contact Icon) • Menu (Link: Menu Tab)

	• Loan History (Link: Aid Tab) • Organization Contact List (Link: Org Tab) • Reports (Link: Reports Tab) • Transfer Monitoring List (Link: Menu Tab) • External Contact List (Link: Support Tab) • Privacy Act (Link: Privacy Act)
Gif Name:	The following graphical objects may appear on this screen: • Info.gif • Help.gif • back.gif • error.gif

3.3.2   Design Details

The following screenshot highlights the functionality of the Enrollment Detail screen.

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Enrollment Detail

Reported By	Reported By ID	Status	Eff. Date	Active	ACD	Cert. Date	Cert. Method	Date Received
SANTA CLARA UNIVERSITY 00132600								
School	00132600	Leave of Absence	01/01/1970	Yes	12/30/1971	07/22/1998	School Batch	10/29/2001
UNIVERSITY OF CONNECTICUT 00141700								
School	00141700	Leave of Absence	05/23/1998	Yes	05/23/2000	10/15/1998	School Batch	10/29/2001
BRIGHAM YOUNG UNIVERSITY 00367000								
School	00367000	Half Time	09/07/2000	Yes	11/15/2000	09/07/2000	School Batch	10/29/2001

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Figure 6, Enrollment Detail

3.3.3   Screen Functionality

The following section describes each object on the screen and the functionality behind the object.

Enrollment Summary	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Enrollment Summary screen. This link is deactivated when the user is in the Enrollment Summary screen.
Actions to be performed	When clicked, the Enrollment Summary screen appears.
User Group (Element Level)	TBD
Validation	None.

Enrollment Add	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Enrollment Add screen.
Actions to be performed	When clicked, the Enrollment Add screen appears.
User Group (Element Level)	TBD
Validation	None.

Enrollment Update	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Enrollment Update screen.
Actions to be performed	When clicked, the Enrollment Update screen appears.
User Group (Element Level)	TBD
Validation	None.

Enrollment Reporting Schedule	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Enrollment Reporting Schedule screen.
Actions to be performed	When clicked, the Enrollment Reporting

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Enrollment Reporting Schedule	
	Schedule screen appears.
User Group (Element Level)	TBD
Validation	None.

SSN	
Element	Textbox
Definition/Business Rules	Allows a user to enter a Social Security Number. SSN must be entered in a "123456789" or "123-45-6789" format. The history icon will appear next to the SSN if a user has had multiple SSNs in the past.
Actions to be performed	As the user enters their SSN, it is displayed in the textbox in editable format.
User Group (Element Level)	TBD
Validation	None.

First Name	
Element	Textbox
Definition/Business Rules	Allows a user to enter a First Name. First Name can be up to 12 characters.
Actions to be performed	As the user enters their Name, it is displayed in the textbox in editable format.
User Group (Element Level)	TBD
Validation	None.

DOB	
Element	Textbox
Definition/Business Rules	Allows a user to enter a Date of Birth. DOB must be entered with a "MMDDCCYY", "MM/DD/CCYY" or "MM-DD-CCYY" format.
Actions to be performed	As the user enters their Date of Birth, it is displayed in the textbox in editable format.
User Group (Element Level)	TBD
Validation	None.

Retrieve	

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Retrieve	
Element	Pushbutton
Definition/Business Rules	Allows a user to retrieve loan information on a specific student based on the search criteria entered in the SSN, First Name, and DOB fields.
Actions to be performed	By clicking on the pushbutton, validation is performed. If there are no errors and students matching the criteria are identified, the Enrollment Detail is displayed for each student. If there are errors, the appropriate error message is displayed. If there are no errors and no students are found, a message indicating that no records are found.
User Group (Element Level)	TBD
Validation	• *Condition*: If the user has entered valid data in the SSN field or in the SSN, First Name, and DOB fields, the data for that particular student will be displayed in the Enrollment Summary screen. *Message*: None. *Location*: Server *Additional Information*: None. • *Condition*: A user has entered a valid SSN but an invalid First Name and DOB. *Message*: Match on SSN. No match on DOB & First Name. The PLUS SSN was not found. *Location*: Client *Additional Information*: Display error.gif. • *Condition*: A user has entered an invalid SSN. *Message*: The Student SSN was not found. The PLUS SSN was not found. *Location*: Server *Additional Information*: Display error.gif. • *Condition*: A user has entered a SSN and

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Retrieve
First Name or DOB. *Message*: Please enter either all 3 identifiers or SSN. *Location*: Client *Additional Information*: The label font color for the field whose data was not provided becomes red. Display error.gif.   • *Condition*: A user enters a SSN less than 9 characters. *Message*: Please enter a 9 digit numeric SSN. *Location*: Client *Additional Information*: The label font color for the SSN field becomes red. Display error.gif. .   • *Condition*: A user has entered a valid SSN and First Name and an invalid DOB. *Message*: Please enter the Date of Birth in the MMDDCCYY format. Display error.gif. *Location*: Client *Additional Information*: The label font color for the DOB field becomes red.

Name Search	
Element	Pushbutton
Definition/Business Rules	Allows a user to navigate to the Student/PLUS Borrower Name Search screen.
Actions to be performed	Users clicks on the pushbutton.
User Group (Element Level)	TBD
Validation	None.

Return to Enrollment Summary	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Enrollment Summary screen.
Actions to be performed	When clicked, the Enrollment Summary screen

Return to Enrollment Summary	
	appears.
User Group (Element Level)	TBD
Validation	None.

John A Smith	
Element	Label
Definition/Business Rules	Displays the Name of a borrower whose enrollment information is displayed. The history icon will appear next to the name if a user has had multiple names in the past.
Actions to be performed	The name of the borrower is automatically displayed.
User Group (Element Level)	TBD
Validation	None.

123-45-6789	
Element	Label
Definition/Business Rules	Displays the Social Security Number of a borrower whose enrollment information is displayed. The history icon will appear next to the SSN if a user has had multiple SSNs names in the past.
Actions to be performed	The SSN is automatically displayed.
User Group (Element Level)	TBD
Validation	None.

01/01/1980	
Element	Label
Definition/Business Rules	Displays the Date of Birth of a borrower whose enrollment information is displayed.
Actions to be performed	The Date of Birth is automatically displayed.
User Group (Element Level)	TBD
Validation	None.

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Enrollment At	
Element	Dropdown Box
Definition/Business Rules	Allows a user to select enrollment information about all the schools the student has attended or about an individual school identified by name and OPEID. If there are multiple schools a student has attended, this field will display "All Schools" (the exception to this is when the user selects the Record Number in the Enrollment Summary screen, then this field will display the name of the school). The dropdown box will contain a list of all the schools the student has been enrolled at. If the student has only attended one school this field will display the name of that school.
Actions to be performed	When the user clicks on the Enrollment At Dropdown Box, a list of schools that the student attended appear.
User Group (Element Level)	TBD
Validation	None.

Show Records:	
Element	Dropdown Box
Definition/Business Rules	Allows a user to select which records to view: • *All Active and Inactive*—Allows a user to view a complete record of what enrollment information was reported to the NSLDS and when it was reported. If a user selects this option, a user should distinguish between active records, which contain current information about a student's enrollment history, and inactive records, which contain enrollment information previously reported to the NSLDS but no longer current.

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Show Records:
• *Active Only*—Active records collectively constitute the NSLDS's current understanding of a student's enrollment history. (Inactive records contain enrollment information that was reported to the NSLDS at some time in the past but then corrected at a later date.) Showing all active records allows a user to view a complete record of a student's enrollment history, as the NSLDS currently understands it. • *Active Only, Changes Only, Earliest Certified*—Allows a user to view only active records that contain a change in Enrollment Status, Effective Date, or Anticipated Completion Date from the previous record reported to the NSLDS. If user select this option, records containing such changes are displayed together with the first Certification Date on which they took effect. • *Active Only, Changes Only, Latest Certified (Default Setting)*—Allows a user to view only active records that contain a change in Enrollment Status, Effective Date, or Anticipated Completion Date from the previous record reported to the NSLDS. If a user selects this option, records containing such changes are displayed together with the last Certification Date on which they were in effect.

Actions to be performed	When the user clicks on the Show Records Dropdown Box, a list of options appear that allow a user to select what data they would like to view.
User Group (Element Level)	TBD

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Show Records:	
Validation	None.

Reported By:	
Element	Dropdown Box
Definition/Business Rules	Allows a user to restrict the enrollment information that displays to what was reported by specific types of organizations. • *All*—Allows you to view information reported by both schools and non-school organizations such as guaranty agencies and lenders. • *Schools (Default Setting)*—Allows you to view only information reported by schools. • *Non-Schools*—Allows you to view only information reported by organizations other than schools, including guaranty agencies and lenders.
Actions to be performed	When the user clicks on the Reported By Dropdown Box, a list of options appear that allow a user to select who reported the enrollment information.
User Group (Element Level)	TBD
Validation	None.

Sort Schools By:	
Element	Dropdown Box
Definition/Business Rules	Allows a user to select the order in which the schools students have attended are displayed on the page. • *OPEID (Default Setting)*—Orders the schools numerically by their eight-digit Office of Postsecondary Education Identification number (OPEID).

Sort Schools By:	
	• *Name—*Orders the schools alphabetically by their names. • *Merge Schools—*Combines enrollment information from all the schools the student attended in a single table.
Actions to be performed	When the user clicks on the Sort Schools By Dropdown Box, a list of options appear that allow a user to sort the schools a student attended.
User Group (Element Level)	TBD
Validation	None.

Sort Records By:	
Element	Dropdown Box
Definition/Business Rules	
Actions to be performed	When the user clicks on the Sort Schools By Dropdown Box, a list of options appear that allow a user to sort the records for a student's enrollment at a given school.
User Group (Element Level)	TBD
Validation	None.

Begin Effective Date:	
Element	Textbox
Definition/Business Rules	Allows a user to display only records with an Effective Date later than or equal to the date entered.
Actions to be performed	As the user enters the Begin Effective Date, it is displayed in the textbox in editable format.
User Group (Element Level)	TBD
Validation	None.

End Effective Date:	
Element	Textbox
Definition/Business Rules	Allows a user to display only records with an

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End Effective Date:	
	Effective Date earlier than or equal to the date entered.
Actions to be performed	As the user enters the End Effective Date, it is displayed in the textbox in editable format.
User Group (Element Level)	TBD
Validation	None.

Apply	
Element	Pushbutton
Definition/Business Rules	Allows a user to submit the criteria selected in the Advanced Display Options.
Actions to be performed	By clicking on the pushbutton, the selected records that meet the user's criteria are displayed.
User Group (Element Level)	TBD
Validation	TBD

Santa Clara University 00132600	
Element	Link
Definition/Business Rules	Displays the name and OPEID of the school where enrollment has been reported for a student. These normally display on a separate row that divides the records for enrollment at one school from the records for enrollment at another school. When a user selects Merge Schools as the option for Sort Schools By, schools' OPEIDs display in a single column at the left side of the Enrollment Detail table.
Actions to be performed	When clicked, the Organization Contact List screen appears with State University's contact information.
User Group (Element Level)	TBD
Validation	None.

Reported By	
Element	Label
Definition/Business Rules	Displays the type of organization that reported

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Reported By	
	the enrollment information.
Actions to be performed	The Reported By data is automatically displayed.
User Group (Element Level)	TBD
Validation	None.

Reported By ID	
Element	Label
Definition/Business Rules	Displays the organizational code, such as the OPEID or guaranty agency number, for the organization that reported the enrollment information.
Actions to be performed	The Reported By ID is automatically displayed.
User Group (Element Level)	TBD
Validation	None.

Status	
Element	Label
Definition/Business Rules	Displays the student's enrollment status.
Actions to be performed	The Status is automatically displayed.
User Group (Element Level)	TBD
Validation	None.

Eff. Date	
Element	Label
Definition/Business Rules	Displays the Effective Date, which is the date when the reported status took effect. The following special rules apply: • The NSLDS sets Effective Date equal to Certification Date for Enrollment Status 'Z' (No Record Found). • The NSLDS sets Effective Date equal to 12/31/9999 when it is not supplied by the school for records with an Enrollment

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Eff. Date	
	Status of 'D' (Deceased).
Actions to be performed	The Eff. Date is automatically displayed.
User Group (Element Level)	TBD
Validation	None.

Active	
Element	Label
Definition/Business Rules	Displays a flag identifying whether a record reflects the NSLDS's current understanding of a student's enrollment history. • *Yes*—Indicates that the record is active and reflects the NSLDS's current understanding of a student's enrollment history. • *No*—Indicates that the record is no longer active. It contains enrollment information that was reported to the NSLDS at some point in the past but was subsequently corrected by a later submission.
Actions to be performed	The active field is automatically displayed.
User Group (Element Level)	TBD
Validation	None.

ACD	
Element	Label
Definition/Business Rules	Displays the Anticipated Completion Date, which is the date when the student completed, or was expected to complete, his or her studies. The following special rules apply: • The NSLDS sets Anticipated Completion Date to 01/01/0001 for Enrollment Status 'Z' (No Record Found), 'W' (Withdrawn), and 'L' (Less Than Half

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ACD	
	Time). • The NSLDS sets Anticipated Completion Date to 12/31/9999 for Enrollment Status 'D' (Deceased). • The NSLDS sets Anticipated Completion Date equal to Effective Date for Enrollment Status 'G' (Graduated).
Actions to be performed	The ACD is automatically displayed.
User Group (Element Level)	TBD
Validation	None.

Cert Date	
Element	Label
Definition/Business Rules	Displays the Certification Date, which is the date as of which the school certified that the enrollment information was accurate.
Actions to be performed	The Cert Date is automatically displayed.
User Group (Element Level)	TBD
Validation	None.

Cert Method	
Element	Label
Definition/Business Rules	Displays the Certification Method the school used to certify the enrollment information. • *School Batch*—The school certified the enrollment information through the batch enrollment reporting process. • *NSLDS Web*—The school certified the enrollment information using the Enrollment Maintenance page on this site.
Actions to be performed	The Cert Method is automatically displayed.

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Cert Method	
User Group (Element Level)	TBD
Validation	None.

Date Received	
Element	Label
Definition/Business Rules	Displays the day when NSLDS processed the enrollment information.
Actions to be performed	The Date Received is automatically displayed.
User Group (Element Level)	TBD
Validation	None.

3.4 Enrollment Timeline

Description	Displays a chronological view of a student's enrollment history. This page is intended to help users, especially lenders, see all of a student's enrollment statuses at a given time in the past and how long those statuses remained in effect.
New or Existing	Existing
User Group (Screen Level)	$ED, $GAINQ, $CSC, $SCHFAT, STAGNT, $SCHSCR, $PICLET, SCHDPC, $LENDER, $LENDSV
Requirements Traceability	1.030
Reference(s)	ENTIME.ASP
Business Object	Student, Plus Borrower, School, GA, Lender

3.4.1 Software Unit Logic

ASP File Name:	entime.asp
Pre-Status:	This screen is accessible from the following screens (depending on user access privileges): • Enrollment Summary (Pushbutton: Enrollment Timeline)
Post-Status:	This screen allows a user to navigate to any of the following screens (depending on user access privileges):

	• Enrollment Summary (Link: Enrollment Summary) • Enrollment Add (Link: Enrollment Add) • Enrollment Update (Link: Enrollment Update) • Enrollment Reporting Schedule (Link: Enrollment Reporting Schedule) • System Log On (Link: Logoff Icon) • Contact Us (Link: Contact Icon) • Menu (Link: Menu Tab) • Loan History (Link: Aid Tab) • Organization Contact List (Link: Org Tab) • Reports (Link: Reports Tab) • Transfer Monitoring List (Link: Menu Tab) • External Contact List (Link: Support Tab) • Privacy Act (Link: Privacy Act)
Gif Name:	The following graphical objects may appear on this screen: • Info.gif • Help.gif • back.gif • error.gif

3.4.2 Design Details

The following screenshot highlights the functionality of the Enrollment Timeline screen.

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NSLDS

| Menu | Aid | Enroll | Org | Report | Tran | Support |

Enrollment Summary | Enrollment Add | Enrollment Update | Enrollment Reporting Schedule

SSN: [_____]   First Name: [_____]   DOB: [_____] (MMDDCCYY)   [Name Search]
[Retrieve]

Logged on as: SUNIL MALHOTRA from UNIVERSITY OF MONTEVALLO

◀◀ Return To Enrollment Summary

JOHN A SMITH	
SSN: 123-45-6789	DOB: 01/01/1980

Enrollment Timeline

? **Advanced Display Options**

Reported By: [Schools ▼]
Date: [_____]

[Apply]

Statuses in Effect 09/07/2000 - Present

School OPEID	Reported By	Reported By ID	Status	Eff. Date	Last ACD
00367000	School	00367000	Half Time	09/07/2000	11/15/2000
00141700	School	00141700	Leave of Absence	05/23/1998	05/23/2000
00132600	School	00132600	Leave of Absence	01/01/1970	12/30/1971

Statuses in Effect 05/23/1998 - 09/06/2000

School OPEID	Reported By	Reported By ID	Status	Eff. Date	Last ACD
00141700	School	00141700	Leave of Absence	05/23/1998	05/23/2000
00132600	School	00132600	Leave of Absence	01/01/1970	12/30/1971

Statuses in Effect 01/01/1970 - 05/22/1998

School OPEID	Reported By	Reported By ID	Status	Eff. Date	Last ACD
00132600	School	00132600	Leave of Absence	01/01/1970	12/30/1971

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3.4.3   Screen Functionality

The following section describes each object on the screen and the functionality behind the object.

Enrollment Summary	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Enrollment Summary screen. This link is deactivated when the user is in the Enrollment Summary screen.
Actions to be performed	When clicked, the Enrollment Summary screen appears.
User Group (Element Level)	TBD
Validation	None.

Enrollment Add	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Enrollment Add screen.
Actions to be performed	When clicked, the Enrollment Add screen appears.
User Group (Element Level)	TBD
Validation	None.

Enrollment Update	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Enrollment Update screen.
Actions to be performed	When clicked, the Enrollment Update screen appears.
User Group (Element Level)	TBD
Validation	None.

Enrollment Reporting Schedule	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Enrollment

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Enrollment Reporting Schedule	
	Reporting Schedule screen.
Actions to be performed	When clicked, the Enrollment Reporting Schedule screen appears.
User Group (Element Level)	TBD
Validation	None.

SSN	
Element	Textbox
Definition/Business Rules	Allows a user to enter a Social Security Number. SSN must be entered in a "123456789" or "123-45-6789" format.
Actions to be performed	As the user enters their SSN, it is displayed in the textbox in editable format.
User Group (Element Level)	TBD
Validation	None.

First Name	
Element	Textbox
Definition/Business Rules	Allows a user to enter a First Name. First Name can be up to 12 characters.
Actions to be performed	As the user enters their First Name, it is displayed in the textbox in editable format.
User Group (Element Level)	TBD
Validation	None.

DOB	
Element	Textbox
Definition/Business Rules	Allows a user to enter a Date of Birth. DOB must be entered with a "MMDDCCYY", "MM/DD/CCYY" or "MM-DD-CCYY" format.
Actions to be performed	As the user enters their Date of Birth, it is displayed in the textbox in editable format.
User Group (Element Level)	TBD
Validation	None.

Retrieve	
Element	Pushbutton

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Retrieve	
Definition/Business Rules	Allows a user to retrieve loan information on a specific student based on the search criteria entered in the SSN, First Name, and DOB fields.
Actions to be performed	By clicking on the pushbutton, validation is performed. If there are no errors and students matching the criteria are identified, the Enrollment Summary is displayed for each student. If there are errors, the appropriate error message is displayed. If there are no errors and no students are found, a message indicating that no records are found.
User Group (Element Level)	TBD
Validation	• *Condition*: If the user has entered valid data in the SSN field or in the SSN, First Name, and DOB fields, the data for that particular student will be displayed in the Enrollment Summary screen. *Message*: None. *Location*: Server *Additional Information*: None. • *Condition*: A user has entered a valid SSN but an invalid First Name and DOB. *Message*: Match on SSN. No match on DOB & First Name. The PLUS SSN was not found. *Location*: Client *Additional Information*: Display error.gif. • *Condition*: A user has entered an invalid SSN. *Message*: The Student SSN was not found. The PLUS SSN was not found. *Location*: Server *Additional Information*: Display error.gif. • *Condition*: A user has entered a SSN and First Name or DOB.

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Retrieve
Message: Please enter either all 3 identifiers or SSN. *Location*: Client *Additional Information*: The label font color for the field whose data was not provided becomes red. Display error.gif.   • *Condition*: A user enters a SSN less than 9 characters. *Message*: Please enter a 9 digit numeric SSN. *Location*: Client *Additional Information*: The label font color for the SSN field becomes red. Display error.gif.   .   • *Condition*: A user has entered a valid SSN and First Name and an invalid DOB. *Message*: Please enter the Date of Birth in the MMDDCCYY format. *Location*: Client *Additional Information*: The label font color for the DOB field becomes red. Display error.gif.

Name Search	
Element	Pushbutton
Definition/Business Rules	Allows a user to navigate to the Student/PLUS Borrower Name Search screen.
Actions to be performed	By clicking on the pushbutton, the user is directed to the Student/PLUS Borrower Name Search screen.
User Group (Element Level)	TBD
Validation	None.

Return to Enrollment Summary	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Enrollment Summary screen.

Return to Enrollment Summary	
Actions to be performed	When clicked, the Enrollment Summary screen appears.
User Group (Element Level)	TBD
Validation	None.

John A Smith	
Element	Label
Definition/Business Rules	Displays the name of a borrower whose enrollment information is displayed. The history icon will appear next to the name if a user has had multiple names in the past.
Actions to be performed	The name of the borrower is automatically displayed.
User Group (Element Level)	TBD
Validation	None.

123-45-6789	
Element	Label
Definition/Business Rules	Displays the Social Security Number of a borrower whose enrollment information is displayed. The history icon will appear next to the SSN if a user has had multiple SSNs names in the past.
Actions to be performed	The SSN is automatically displayed.
User Group (Element Level)	TBD
Validation	None.

01/01/1980	
Element	Label
Definition/Business Rules	Displays the Date of Birth of a borrower whose enrollment information is displayed.
Actions to be performed	The Date of Birth is automatically displayed.
User Group (Element Level)	TBD
Validation	None.

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Reported By:	
Element	Dropdown Box
Definition/Business Rules	Allows a user to restrict the enrollment information that displays what was reported by specific types of organizations. • *All*—Allows a user to view information reported by both schools and non-school organizations such as guaranty agencies and lenders. • *Schools (Default Setting)*—Allows a user to view only information reported by schools. • *Non-Schools*—Allows a user to view only information reported by organizations other than schools, including guaranty agencies and lenders.
Actions to be performed	When the user clicks on the Reported By Dropdown Box, a list of options appear that allow a user to display enrollment information reported by a specific type of organization.
User Group (Element Level)	TBD
Validation	None.

Date:	
Element	Textbox
Definition/Business Rules	Allows a user to enter the date. There is no default value.
Actions to be performed	As the user enters their Date, it is displayed in the textbox in editable format.
User Group (Element Level)	TBD
Validation	None.

Apply

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Apply	
Element	Pushbutton
Definition/Business Rules	Allows a user to submit the criteria they selected in the Advanced Display Options. The Enrollment Timeline table displays the enrollment information in descending chronological order, from the present to the earliest time period for which any enrollment was reported. The enrollment information displayed on the timeline is ordered by Effective Date.
Actions to be performed	By clicking on the pushbutton, the enrollment timeline appears.
User Group (Element Level)	TBD
Validation	TBD

Statuses in Effect	
Element	Label
Definition/Business Rules	Displays the dates within which a set of enrollment status is in effect. This information occupies the banners that extend across the page and divide one time period from the next.
Actions to be performed	The Statuses in Effect is automatically displayed.
User Group (Element Level)	TBD
Validation	None.

School OPEID	
Element	Label
Definition/Business Rules	Displays the Office of Postsecondary Education Identification number (OPEID) of the school for which enrollment was reported.
Actions to be performed	The School OPEID is automatically displayed.
User Group (Element Level)	TBD
Validation	None.

Reported By

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Reported By	
Element	Label
Definition/Business Rules	Displays the type of organization that reported the enrollment information.
Actions to be performed	The Reported By is automatically displayed.
User Group (Element Level)	TBD
Validation	None.

Reported By ID	
Element	Label
Definition/Business Rules	Displays the organizational code, such as OPEID or guaranty agency number, for the organization that reported the enrollment information.
Actions to be performed	The Reported By ID is automatically displayed.
User Group (Element Level)	TBD
Validation	None.

Status	
Element	Label
Definition/Business Rules	Displays the student's Enrollment Status.
Actions to be performed	The Status is automatically displayed.
User Group (Element Level)	TBD
Validation	None.

Eff. Date	
Element	Label
Definition/Business Rules	Displays the Effective Date, which is the date when the status took effect. The following special rules apply: • The NSLDS sets Effective Date equal to Certification Date for Enrollment Status 'Z' (No Record Found). • The NSLDS sets Effective Date equal to 12/31/9999 when it is not supplied by

Eff. Date	
	the school for records with an Enrollment Status of 'D' (Deceased).
Actions to be performed	The Eff. Date is automatically displayed.
User Group (Element Level)	TBD
Validation	None.

Last ACD	
Element	Label
Definition/Business Rules	Displays the Anticipated Completion Date most recently reported to NSLDS for that status. The Anticipated Completion Date is the date when the student completed, or was expected to complete, his or her studies. The following special rules apply: • The NSLDS sets Anticipated Completion Date to 01/01/0001 for Enrollment Status 'Z' (No Record Found), 'W' (Withdrawn), and 'L' (Less Than Half Time). • The NSLDS sets Anticipated Completion Date to 12/31/9999 for Enrollment Status 'D' (Deceased). • The NSLDS sets Anticipated Completion Date equal to Effective Date for Enrollment Status 'G' (Graduated).
Actions to be performed	The Last ACD is automatically displayed.
User Group (Element Level)	TBD
Validation	None.

3.5   Enrollment Maintenance

Description	Allows school users to update the enrollment information for

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	students attending their school.
New or Existing	Existing
User Group (Screen Level)	$SCHSCR
Requirements Traceability	1.031, 1.032
Reference(s)	ENRLADUP.ASP, WC30 Enrollment Maintenance Retrieval Server, WC32 Enrollment Maintenance Update Server
Business Object	Student, Plus Borrower, School, Loan, Lender, GA, Servicer

3.5.1   Software Unit Logic

ASP File Name:	enrladup.asp
Pre-Status:	This screen is accessible from the following screens (depending on user access privileges): • Enrollment Summary (Pushbutton: Enrollment Maintenance) • Enrollment Update (Pushbutton: Retrieve) • Enrollment Add (Pushbutton: Retrieve)
Post-Status:	This screen allows a user to navigate to any of the following screens (depending on user access privileges): • System Log On (Link: Logoff Icon) • Contact Us (Link: Contact Icon) • Menu (Link: Menu Tab) • Loan History (Link: Aid Tab) • Organization Contact List (Link: Org Tab) • Reports (Link: Reports Tab) • Transfer Monitoring List (Link: Menu Tab) • External Contact List (Link: Support Tab) • Privacy Act (Link: Privacy Act)
Gif Name:	The following graphical objects may appear on this screen: • Check.gif • PrevGroup.gif • NextGroup.gif

	• Info.gif
	• Help.gif
	• SmInfo.gif
	• SmError.gif
	• plus.gif

3.5.2   Design Details

The following screenshot highlights the functionality of the Enrollment Maintenance screen.

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Figure 8, Enrollment Maintenance

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3.5.3   Screen Functionality

The following section describes each object on the screen and the functionality behind the object.

Enrollment Summary	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Enrollment Summary screen. This link is deactivated when the user is in the Enrollment Summary screen.
Actions to be performed	When clicked, the Enrollment Summary screen appears.
User Group (Element Level)	TBD
Validation	None.

Enrollment Add	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Enrollment Add screen.
Actions to be performed	When clicked, the Enrollment Add screen appears.
User Group (Element Level)	TBD
Validation	None.

Enrollment Update	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Enrollment Update screen.
Actions to be performed	When clicked, the Enrollment Update screen appears.
User Group (Element Level)	TBD
Validation	None.

Enrollment Reporting Schedule	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Enrollment Reporting Schedule screen.
Actions to be performed	When clicked, the Enrollment Reporting

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Enrollment Reporting Schedule	
	Schedule screen appears.
User Group (Element Level)	TBD
Validation	None.

Name:	
Element	Label
Definition/Business Rules	Displays the name of the institution whose enrollment information will be displayed.
Actions to be performed	The Name is automatically displayed.
User Group (Element Level)	TBD
Validation	None.

Code:	
Element	Label
Definition/Business Rules	Displays the code of the institution whose enrollment information will be displayed.
Actions to be performed	The Code is automatically displayed.
User Group (Element Level)	TBD
Validation	None.

Type:	
Element	Label
Definition/Business Rules	Displays the type of the institution whose enrollment information will be displayed.
Actions to be performed	The Type is automatically displayed.
User Group (Element Level)	TBD
Validation	None.

Retrieve/Sort By:	
Element	Dropdown Box
Definition/Business Rules	Allows a user to retrieve and display student enrollment records by: • *SSN (Default)*—Displays student records in ascending numeric order by student

Retrieve/Sort By:	
	Social Security Number. • *Last Name*—Displays student records in ascending alphabetic order by student last name. • *Student Designator*—Displays student records ordered by the identifier you use on your internal system, provided that you report that identifier to the NSLDS as part of the Enrollment Reporting process.
Actions to be performed	When the user clicks on the Retrieve/Sort By Dropdown Box, a list of options appear that allow a user to display enrollment records based on the selected criteria.
User Group (Element Level)	TBD
Validation	None.

Begin Value:	
Element	Textbox
Definition/Business Rules	Allows a user to set a lower limit for retrieving and displaying records. If you leave Exact Match Only unchecked, Enrollment Update will retrieve any student records that match the Begin Value you type or come after it in ascending alphanumeric order.
Actions to be performed	As the user enters the Begin Value, it is displayed in the textbox in editable format.
User Group (Element Level)	TBD
Validation	None.

Exact Match Only	
Element	Checkbox
Definition/Business Rules	Must be used in combination with a Begin Value Allows you to retrieve only records that match exactly with the Begin Value you typed. When used with SSN or a unique Student Designator,

Exact Match Only	
	Exact Match Only returns no more than one student record. When used with Last Name, Exact Match Only returns records for all students with that last name.
Actions to be performed	A check will be displayed if the user clicks on the box.
User Group (Element Level)	TBD
Validation	None.

Retrieve	
Element	Pushbutton
Definition/Business Rules	Allows a user to retrieve student information based on the criteria specified in the Retrieve/Sort by, Begin Value, and Exact Match Only fields. The Enrollment Maintenance screen displays up to thirty student records at a time. If the search options retrieve more than thirty records, those records will be spread across as many pages as are necessary to display them thirty at a time. Use the Next and Previous buttons to move from page to page. If a user links to the Enrollment Maintenance screen from the Enrollment Update screen, any Advanced Search Options a user sets on Enrollment Update will remain in effect on Enrollment Maintenance. To change them, a user must return to Enrollment Update. If a user navigates to the Enrollment Maintenance screen from the Enrollment Summary or Enrollment Add screen, a user can only update enrollment information for the student(s) already displayed on the earlier screen. A user cannot initiate a new search for different student enrollment information.

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Retrieve	
Actions to be performed	By clicking on the pushbutton, validation is performed. If there are no errors and students matching the criteria are identified, a list is displayed for each student. If there are errors, the appropriate error message is displayed. If there are no errors and no students are found, a message indicating that no records are found.
User Group (Element Level)	TBD
Validation	TBD

Currently Retrieved/Sorted by:	
Element	Label
Definition/Business Rules	Displays the Search Options in a shaded block. These options determine what records are retrieved from the NSLDS database and displayed in the Enrollment Maintenance screen.
Actions to be performed	The Currently Retrieved/Sorted by is automatically displayed.
User Group (Element Level)	TBD
Validation	None.

Check.gif	
Element	Gif
Definition/Business Rules	Small image of a "check mark" that appears above the checkboxes on the header row.
Actions to be performed	None.
User Group (Element Level)	None.
Validation	None.

Recertification Date	
Element	Textbox
Definition/Business Rules	Allows a user to populate the Certification Date textbox of the individual student records that are selected with the date entered in the Recertification Date textbox.

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Recertification Date	
	This field is automatically populated with the current date as its default value.
Actions to be performed	As the user enters the Recertifcation Date, it is displayed in the textbox in editable format.
User Group (Element Level)	TBD
Validation	None.

Check All	
Element	Pushbutton
Definition/Business Rules	Allows a user to select all the student records that are displayed.

The data entered in the Recertification Date textbox will be populated in all of the Certification Date textboxes. |
| Actions to be performed | By clicking on the pushbutton, all of the checkboxes next to the students are populated with a check, indicating those records have been selected. The "Check All" pushbutton will be hidden and the "Uncheck All" pushbutton will appear.

The data in the Certification Date textboxes are populated with the data in the Recertification Date textbox. |
| User Group (Element Level) | TBD |
| Validation | None. |

Uncheck All	
Element	Pushbutton
Definition/Business Rules	Allows a user to deselect all the student records that are displayed. The Certification Date reverts to whatever date it was set to before the user selected the record, but any other changes the user made to the enrollment information remain.
Actions to be performed	By clicking on the pushbutton, all of the checkboxes next to the students are removed,

Uncheck All	
	indicating those records are not selected. The "Uncheck All" pushbutton will be hidden and the "Check All" pushbutton will appear. The data in the Certification Date textboxes is removed.
User Group (Element Level)	TBD
Validation	None.

Checkbox	
Element	Checkbox
Definition/Business Rules	Allows a user to select or deselect a record for certification.
Actions to be performed	If the checkbox is selected, the Certification Date textbox becomes populated with the data entered in the Recertification Date textbox. If the checkbox is deselected, the Certification Date reverts to whatever date it was set to before the user selected the record, but any other changes the user made to the enrollment information remain.
User Group (Element Level)	TBD
Validation	None.

1	
Element	Link
Definition/Business Rules	An active number icon identifies each record on the page. Clicking the icon links the user to the Enrollment Summary page for that student. Records are numbered in ascending sequence and displayed in groups of 30. As a user updates those records, some may "disappear", leaving gaps in the numbering sequence. This happens under the following circumstances: • A user updates a record with information that falls outside the search options in

1
effect. For example, if you displayed only records with Full Time status and updated some of them to Half Time, the updated records will not be displayed after you confirm the updates.   • A user updates a record to a status that no longer requires their school to report enrollment information for that student.   • Although individual records may "disappear" in this fashion, the group of records displayed on the page retains its integrity until you retrieve a new set of records or leave Enrollment Maintenance entirely. This means that a record that originally displayed on third page of records returned by Enrollment Maintenance will continue to display on the third page no matter how many other records are updated or "disappear". It will not migrate to the second or fourth page as you page up or down.

Actions to be performed	When clicked, the Enrollment Summary screen appears for the selected student.
User Group (Element Level)	TBD
Validation	None.

SSN:	
Element	Label
Definition/Business Rules	Displays the student's Social Security Number.
Actions to be performed	The SSN is automatically displayed.
User Group (Element Level)	TBD
Validation	None.

Name:	
Element	Label

Name:	
Definition/Business Rules	Displays the student's Name.
Actions to be performed	The name of the borrower is automatically displayed.
User Group (Element Level)	TBD
Validation	None.

DOB:	
Element	Label
Definition/Business Rules	Displays the student's Date of Birth.
Actions to be performed	The Date of Birth is automatically displayed.
User Group (Element Level)	TBD
Validation	None.

Certification Date:	
Element	Textbox
Definition/Business Rules	Displays the date as of which you certify that a student's enrollment information is accurate and up-to-date. There are two ways to change the Certification Date for an individual enrollment record: • Type a new Recertification Date at the top of the page and then check the enrollment record. By default, the Recertification Date is set to the current date. • Check the enrollment record first and then edit the contents of the Cert. Date box directly.
Actions to be performed	The Certification Date is displayed in the textbox in editable format.
User Group (Element Level)	TBD
Validation	None.

Enroll Code:	

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Enroll Code:	
Element	Dropdown Box
Definition/Business Rules	Displays the Enrollment Code identifying a student's current enrollment status. Valid values are: • 'A'—Approved Leave of Absence • 'D'—Deceased • 'F'—Full Time • 'G'—Graduated • 'H'—Half Time or More, But Less Than Full Time • 'L'—Less Than Half Time • 'W'—Withdrawn • 'Z'—No Record Found
Actions to be performed	The Enroll Code is displayed in the dropdown box.
User Group (Element Level)	TBD
Validation	None.

Effective Date:	
Element	Textbox
Definition/Business Rules	Displays the date when the student's current status first took effect.
Actions to be performed	The Effective Date is displayed in the textbox in editable format.
User Group (Element Level)	TBD
Validation	None.

Anticipated Comp Date:	
Element	Textbox
Definition/Business Rules	Displays the date when you expect a student to graduate or otherwise complete a course of studies.
Actions to be performed	The Anticipated Comp Date is displayed in the textbox in editable format.
User Group (Element Level)	TBD
Validation	None.

Student Designator:	
Element	Textbox
Definition/Business Rules	Displays the code used to identify students on the school's own database or tracking system.
Actions to be performed	The Student Designator is displayed in the textbox in editable format.
User Group (Element Level)	TBD
Validation	None.

Certify Checked Students	
Element	Pushbutton
Definition/Business Rules	Allows users to certify selected records. Sometimes, submitting and confirming an update to a student's enrollment status causes that student to "disappear" from the Enrollment Maintenance page. This happens because your school no longer has any obligation to report enrollment information for a student under the following circumstances: • There is no longer any lending institution with an interest in tracking the enrollment status of the student. The NSLDS only tracks enrollment information for students with an open FFELP or Direct loan. When you update a student's enrollment status, the NSLDS also verifies that the student still holds an open loan and so is of interest to some lending institution. If the student no longer holds an open loan, the NSLDS removes that student from the Enrollment Maintenance page for your school, regardless of the student's enrollment status. • You update a student's enrollment status

Certify Checked Students	
	to Withdrawn ('W') or Deceased ('D') with an Effective Date more than 180 days in the past. • You update a student's enrollment status to Graduated ('G') with an Effective Date more than 180 days in the past, and the student has a loan with a status of Loan Originated ('IA'), In Grace Period ('IG'), In Military Grace ('IM'), or In School or Grace Period ('ID'). • You update a student's enrollment status to No Record Found ('Z'). If the information you submitted does not pass the edits applied by the NSLDS, Enrollment Maintenance will redisplay with any rows that contained errors preceded by a small error icon. Place your cursor over the icon to display the error message as a ToolTip.
Actions to be performed	By clicking on the pushbutton, the selected students are certified upon a successful pass of validation checks.
User Group (Element Level)	TBD
Validation	• *Condition*: The user has specified an invalid Certification date for a given row. *Message*: Certification date format is invalid. *Location*: Client *Additional Information*: Display SmError.gif. • *Condition*: The user has specified a Certification date that is more than 72 days old for a given row. *Message*: Certification too old. *Location*: Client *Additional Information*: Display SmError.gif. • *Condition*: The user has specified a Certification date that is greater than the current date for a given

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Certify Checked Students

| | row.
Message: Certification cannot be a date in the future.
Location: Client
 Additional Information: Display SmError.gif.

• *Condition*: The user has specified an invalid enrollment Effective date or entered an Enrollment Code that doesn't conform to requirements for a given row.
Message: Enrollment Effective date &/or code combination invalid.
Location: Client
 Additional Information: Display SmError.gif.

• *Condition*: The user has not specified an enrollment Effective date for a given row.
Message: Enrollment Effective date is missing.
Location: Client
 Additional Information: Display SmError.gif.

• *Condition*: The user has specified an invalid Anticipated Completion date for a given row.
Message: Anticipated Completion Date invalid format.
Location: Client
 Additional Information: Display SmError.gif.

• *Condition*: The user has specified an Anticipated Completion date that is less than or equal to the Enrollment Effective date that accompanies an Enrollment Code of: "F", "H" or "A" for a given row.
Message: Anticipated Completion Date Must be greater than Effective date when edited (F,H,A).
Location: Client
 Additional Information: Display SmError.gif.

• *Condition*: The user has specified an Anticipated Completion date that is more than 10 years after the Certification date for a given row. |

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Certify Checked Students
Message: Anticipated Completion Date can not be more than 10 years after the Certification. *Location*: Client *Additional Information*: Display SmError.gif. • *Condition*: The user has specified an Anticipated Completion date that is less than or equal to the Enrollment Effective date for a given row. *Message*: Anticipated Completion Date must be greater than Certification date. *Location*: Client *Additional Information*: Display SmError.gif. • *Condition*: The user has not specified an Enrollment Code for a given row. *Message*: Enrollment code is missing. *Location*: Client *Additional Information*: Display SmError.gif. • *Condition*: The user has specified a new Enrollment Code of "X" or "Z", and the previous Enrollment Code was not "F", "H" or "L" for a given row. *Message*: Enrollment code X or Z must be preceded by a prior valid F,H,L or A Enrollment code. *Location*: Client *Additional Information*: Display SmError.gif. • *Condition*: The user has specified an Enrollment Effective date that is not less than or equal to Certification date for a given row. *Message*: Enrollment Effective date must be less than or equal to Certification date. *Location*: Client *Additional Information*: Display SmError.gif. • *Condition*: The user has attempted to certify a given row with Enrollment Code of "A" and a Certification date that is not less or equal to 180 days after the Enrollment effective date. *Message*: For Enrollment A, Certification must be

Certify Checked Students

| | less or equal to 180 days after Enrollment effective.
Location: Client
Additional Information: Display SmError.gif.

• *Condition*: The user has specified a new Certification date that precedes the last reported Certification date for a given row.
Message: Certification is prior to a previous certification and ACD, Enrollment code or effective date is different from last reported.
Location: Server
Additional Information: Display SmError.gif.

• *Condition*: The user attempted to certify a given row with a Certification date that is equal to the Enrollment Effective date without changing the Enrollment code.
Message: If Enrollment code is F, H, or A, then Certification can not be equal effective date if the enrollment has not changed from the previously reported value.
Location: Server
Additional Information: Display SmError.gif.

• *Condition*: The user has attempted to certify a roster entry (a given row) for a student that is no longer on NSLDS.
Message: Student could not be identified on the database.
Location: Server
Additional Information: Display SmError.gif. |

Reset	
Element	Pushbutton
Definition/Business Rules	Allows a user to redisplay the Enrollment Maintenance screen with whatever information it displayed after its last trip to the database. This creates two possibilities: • If you have not clicked Submit,

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Reset	
	Enrollment Maintenance will redisplay with the information it displayed when you first navigated to it. • If you have clicked Submit one or more times, Enrollment Maintenance will redisplay the information it displayed after you last clicked Submit.
Actions to be performed	By clicking on the pushbutton, the fields are returned to their initial state.
User Group (Element Level)	TBD
Validation	None.

Confirm	
Element	Pushbutton
Definition/Business Rules	Allows a user to submit their changes to student enrollment records. This pushbutton appears after the user clicks on the Certify Checked Students pushbutton and all edits have successfully passed. The following message should appear at the top of the screen: The updated enrollment information you submitted is displayed below. Click Confirm to apply the information to the database, or click Cancel to return to the Enrollment Maintenance page. Please note that your updates may cause students to no longer appear on the Enrollment Maintenance page. See Help for further explanation. A user must submit and confirm any changes to the enrollment records displayed on an

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Confirm	
	individual Enrollment Maintenance screen before navigating to another page. Clicking the Previous or Next arrow, or otherwise navigating to another page, before submitting and confirming changes causes any new data you typed to be lost.
Actions to be performed	By clicking on the pushbutton, the Enrollment Maintenance screen appears.
User Group (Element Level)	TBD
Validation	TBD

Cancel	
Element	Pushbutton
Definition/Business Rules	Allows a user to cancel their changes to student enrollment records. The following message should appear at the top of the screen: The updated enrollment information you submitted is displayed below. Click Confirm to apply the information to the database, or click Cancel to return to the Enrollment Maintenance page. Please note that your updates may cause students to no longer appear on the Enrollment Maintenance page. See Help for further explanation. A user must submit and confirm any changes to the enrollment records displayed on an individual Enrollment Maintenance screen before navigating to another page. Clicking the Previous or Next arrow, or otherwise navigating to another page, before submitting and confirming changes causes any new data you typed to be lost.

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Cancel	
Actions to be performed	By clicking on the pushbutton, the Enrollment Maintenance screen appears. This pushbutton appears after the user clicks on the Certify Checked Students pushbutton and all edits have successfully passed.
User Group (Element Level)	TBD
Validation	TBD

3.6 Enrollment Add

Description	Allows school users to retrieve student records, so they can update enrollment information for those students on the Enrollment Maintenance page. The Enrollment Add Search page allows users to enter Student SSNs or Student SSN, First Name and Date of Birth for up to 30 students for the purpose of validation of data in the database and submittal of data to the Enrollment Maintenance page.
New or Existing	Existing
User Group (Screen Level)	$SCHSCR
Requirements Traceability	1.033
Reference(s)	ENRLADSR.ASP, WC31_ENROLLMENT_ADD_SEARCH_SVR
Business Object	Student, Plus Borrower, School

3.6.1 Software Unit Logic

ASP File Name:	ENRLADSR.asp
Pre-Status:	This screen is accessible from the following screens (depending on user access privileges): • Enrollment Summary (Link: Enrollment Add) • Enrollment Update (Link: Enrollment Add)

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	• Enrollment Reporting Schedule (Link: Enrollment Add) • Enrollment Detail (Link: Enrollment Add) • Enrollment Timeline (Link: Enrollment Add) • Enrollment Maintenance (Link: Enrollment Add) • Student/PLUS Borrower Name Search (Link: Enrollment Add) • Enrollment Reporting Schedule Create (Link: Enrollment Add) • Enrollment Reporting Schedule Create Confirm (Link: Enrollment Add) • Enrollment Reporting Schedule Modify (Link: Enrollment Add) • Menu (Link: Enrollment Add)
Post-Status:	This screen allows a user to navigate to any of the following screens (depending on user access privileges): • Enrollment Summary (Link: Enrollment Summary) • Enrollment Update (Link: Enrollment Update) • Enrollment Reporting Schedule (Link: Enrollment Reporting Schedule) • System Log On (Link: Logoff Icon) • Contact Us (Link: Contact Icon) • Menu (Link: Menu Tab) • Loan History (Link: Aid Tab) • Organization Contact List (Link: Org Tab) • Reports (Link: Reports Tab) • Transfer Monitoring List (Link: Menu Tab) • External Contact List (Link: Support Tab)
Gif Name:	The following graphical objects may appear on this screen: • Error.gif

3.6.2   Design Details

The following screenshot highlights the functionality of the Enrollment Add screen.

Figure 8, Enrollment Add

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3.6.3   Screen Functionality

The following section describes each object on the screen and the functionality behind the
object.

Enrollment Summary	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Enrollment Summary screen. This link is deactivated when the user is in the Enrollment Summary screen.
Actions to be performed	When clicked, the Enrollment Summary screen appears.
User Group (Element Level)	TBD
Validation	None.

Enrollment Add	
Element	Link (Deactivated)
Definition/Business Rules	Allows a user to navigate to the Enrollment Add screen.
Actions to be performed	None.
User Group (Element Level)	TBD
Validation	None.

Enrollment Update	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Enrollment Update screen.
Actions to be performed	When clicked, the Enrollment Update screen appears.
User Group (Element Level)	TBD
Validation	None.

Enrollment Reporting Schedule	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Enrollment Reporting Schedule screen.
Actions to be performed	When clicked, the Enrollment Reporting Schedule screen appears.

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Enrollment Reporting Schedule	
User Group (Element Level)	TBD
Validation	None.

Type:	
Element	Dropdown Box
Definition/Business Rules	Allows a user to select a type of organization. The different options are (displayed in this order): • --- Select --- • FDLP SERVICER • ED REGION • GUARANTY AGENCY • LENDER • LENDER BRANCH SERVICER • SCHOOL • STATE AGENCY
Actions to be performed	When the user clicks on the Type Dropdown Box, all the options appear. The "Select" option is highlighted.
User Group (Element Level)	TBD
Validation	None.

Code:	
Element	Textbox
Definition/Business Rules	Allows a user to enter an organization code. The textbox holds up to 8 characters.
Actions to be performed	As the user enters the organization code, it is displayed in the textbox in editable format.
User Group (Element Level)	TBD
Validation	None.

Name:	
Element	Textbox
Definition/Business Rules	Allows a user to enter an organization name.

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Name:	
	The textbox holds up to 45 characters.
Actions to be performed	As the user enters the organization name, it is displayed in the textbox in editable format.
User Group (Element Level)	TBD
Validation	None.

Retrieve	
Element	Pushbutton
Definition/Business Rules	Allows a user to retrieve loan information for a specific organization based on the search criteria entered in the Type, Code, and Name fields.
Actions to be performed	By clicking on the pushbutton, validation is performed. If there are no errors and the organization matching the criteria is identified, the Enrollment Add screen is displayed with the organization's information. If there are errors, the appropriate error message is displayed. If there are no errors and an organization is not found, the user is redirected to the Organization Search screen.
User Group (Element Level)	TBD
Validation	TBD

Name:	
Element	Label
Definition/Business Rules	Displays the name of the organization whose enrollment information will be displayed.
Actions to be performed	The Name is automatically displayed.
User Group (Element Level)	TBD
Validation	None.

Code:	
Element	Label
Definition/Business Rules	Displays the code of the institution whose enrollment information will be displayed.
Actions to be performed	The organization's code is automatically displayed.

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Code:	
User Group (Element Level)	TBD
Validation	None.

Type:	
Element	Label
Definition/Business Rules	Displays the type of the institution whose enrollment information will be displayed.
Actions to be performed	The organization's type is automatically displayed.
User Group (Element Level)	TBD
Validation	None.

SSN	
Element	Textbox
Definition/Business Rules	Allows a user to enter a borrower's SSN. The textbox holds up to 11 characters. If you type SSN only, and that SSN is shared by two or more students, Enrollment Add will require you to type First Name and DOB as well to retrieve a student. If any identifiers (i.e., SSN, First Name, DOB) fail edits, Enrollment Add displays a general error message at the top of the page. In addition, it displays small error icons before each row of identifiers containing an error. To see the error message for a particular row, run your cursor over the small error icon, and the error message displays as a ToolTip.
Actions to be performed	As the user enters their SSN, it is displayed in the textbox in editable format.
User Group (Element Level)	TBD
Validation	None.

First Name	
Element	Textbox

First Name	
Definition/Business Rules	Allows a user to enter a borrower's First Name. The textbox holds up to 12 characters.
Actions to be performed	As the user enters their First Name, it is displayed in the textbox in editable format.
User Group (Element Level)	TBD
Validation	None.

DOB	
Element	Textbox
Definition/Business Rules	Allows a user to enter a borrower's DOB. The textbox holds up to 10 characters.
Actions to be performed	As the user enters their DOB, it is displayed in the textbox in editable format.
User Group (Element Level)	TBD
Validation	None.

Clear	
Element	Pushbutton
Definition/Business Rules	Allows a user to remove any data entered in the SSN, First Name, and/or DOB textboxes for a given row.
Actions to be performed	By clicking on the pushbutton, the data entered in the SSN, First Name, and/or DOB are removed.
User Group (Element Level)	TBD
Validation	None.

Retrieve	
Element	Pushbutton
Definition/Business Rules	Allows a user to retrieve the enrollment information for selected students. The Enrollment Maintenance screen appears. • If you have never reported the student as attending your school, only the student's

Retrieve
SSN, Name, and DOB will display on the Enrollment Maintenance page. The boxes for enrollment information will all be blank. • If you have previously reported the student as attending your school, the student's SSN, Name, and DOB will display on the Enrollment Maintenance page. In addition, the boxes for enrollment information will be populated with the enrollment information you most recently reported for that student. You will be able to update those boxes as necessary. Small "info" icons will appear in the Enrollment Maintenance screen next to the borrowers whose enrollment information was entered in the Enrollment Add screen. A message will also appear at the top of the Enrollment Maintenance screen displaying the following: Please confirm identifiers (SSN, First Name, DOB) for rows marked with small "info" icons.

Actions to be performed	By clicking on the pushbutton, validation is performed. If there are no errors, the Enrollment Maintenance screen appears with the student's information. If there are errors, the appropriate error message is displayed. If there are no errors and no students are found, a message indicating that no records are found.
User Group (Element Level)	TBD
Validation	TBD

3.7   Enrollment Update

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Description	Allows school users to retrieve enrollment information for students attending their school so they can update that information on the Enrollment Maintenance page.
New or Existing	Existing
User Group (Screen Level)	$SCHSCR
Requirements Traceability	1.034, 1.035, 1.036
Reference(s)	ENROLUPSR.ASP, WC30 Enrollment Maintenance Retrieval Server
Business Object	Student, Plus Borrower, School

3.7.1   Software Unit Logic

ASP File Name:	ENRLUPSR.asp
Pre-Status:	This screen is accessible from the following screens (depending on user access privileges): • Enrollment Summary (Link: Enrollment Update) • Enrollment Add (Link: Enrollment Update) • Enrollment Reporting Schedule (Link: Enrollment Update) • Enrollment Detail (Link: Enrollment Update) • Enrollment Timeline (Link: Enrollment Update) • Enrollment Maintenance (Link: Enrollment Update) • Student/PLUS Borrower Name Search (Link: Enrollment Update) • Enrollment Reporting Schedule Create (Link: Enrollment Update) • Enrollment Reporting Schedule Create Confirm (Link: Enrollment Update) • Enrollment Reporting Schedule Modify (Link: Enrollment Update) • Menu (Link: Enrollment Update)
Post-Status:	This screen allows a user to navigate to any of the following screens (depending on user access privileges): • Enrollment Summary (Link: Enrollment Summary) • Enrollment Add (Link: Enrollment Add)

	• Enrollment Reporting Schedule (Link: Enrollment Reporting Schedule) • System Log On (Link: Logoff Icon) • Contact Us (Link: Contact Icon) • Menu (Link: Menu Tab) • Loan History (Link: Aid Tab) • Organization Contact List (Link: Org Tab) • Reports (Link: Reports Tab) • Transfer Monitoring List (Link: Menu Tab) • External Contact List (Link: Support Tab) • Privacy Act (Link: Privacy Act)
Gif Name:	The following graphical objects may appear on this screen: • Info.gif • Help.gif

3.7.2 Design Details

The following screenshot highlights the functionality of the Enrollment Update screen.

Figure 10, Enrollment Update

3.7.3   Screen Functionality

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The following section describes each object on the screen and the functionality behind the object.

Enrollment Summary	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Enrollment Summary screen. This link is deactivated when the user is in the Enrollment Summary screen.
Actions to be performed	When clicked, the Enrollment Summary screen appears.
User Group (Element Level)	TBD
Validation	None.

Enrollment Add	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Enrollment Add screen.
Actions to be performed	When clicked, the Enrollment Add screen appears.
User Group (Element Level)	TBD
Validation	None.

Enrollment Update	
Element	Link (Deactivated)
Definition/Business Rules	Allows a user to navigate to the Enrollment Update screen.
Actions to be performed	None.
User Group (Element Level)	TBD
Validation	None.

Enrollment Reporting Schedule	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Enrollment Reporting Schedule screen.
Actions to be performed	When clicked, the Enrollment Reporting Schedule screen appears.
User Group (Element Level)	TBD
Validation	None.

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Name:	
Element	Label
Definition/Business Rules	Displays the name of the institution whose enrollment information will be displayed.
Actions to be performed	The organization's name is automatically displayed.
User Group (Element Level)	TBD
Validation	None.

Code:	
Element	Label
Definition/Business Rules	Displays the code of the institution whose enrollment information will be displayed.
Actions to be performed	The organization's code is automatically displayed.
User Group (Element Level)	TBD
Validation	None.

Type:	
Element	Label
Definition/Business Rules	Displays the type of the institution whose enrollment information will be displayed.
Actions to be performed	The organization's type is automatically displayed.
User Group (Element Level)	TBD
Validation	None.

Retrieve/Sort By:	
Element	Dropdown Box
Definition/Business Rules	Allows a user to retrieve and display student enrollment records by: *SSN (Default)*—Displays student records in ascending numeric order by student Social Security Number. *Last Name*—Displays student records in

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Retrieve/Sort By:	
	ascending alphabetic order by student last name. • *Student Designator*—Displays student records ordered by the identifier you use on your internal system, provided that you report that identifier to the NSLDS as part of the Enrollment Reporting process.
Actions to be performed	When the user clicks on the Retrieve/Sort By Dropdown Box, a list of options appear that allow a user to display enrollment records based on the selected criteria.
User Group (Element Level)	TBD
Validation	None.

Begin Value:	
Element	Textbox
Definition/Business Rules	Allows a user to set a lower limit for retrieving and displaying records. If you leave Exact Match Only unchecked, Enrollment Update will retrieve any student records that match the Begin Value you type or come after it in ascending alphanumeric order.
Actions to be performed	As the user enters the Begin Value, it is displayed in the textbox in editable format.
User Group (Element Level)	TBD
Validation	None.

Exact Match Only	
Element	Checkbox
Definition/Business Rules	Must be used in combination with a Begin Value. Allows you to retrieve only records that match exactly with the Begin Value you typed. When used with SSN or a unique Student Designator, Exact Match Only returns no more than one student record. When used with Last Name, Exact Match Only returns records for all students with that last name.

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Exact Match Only	
Actions to be performed	A check will be displayed if the user clicks on the box.
User Group (Element Level)	TBD
Validation	None.

Last Name Begin/End	
Element	Textbox
Definition/Business Rules	Allow a user to retrieve records for students whose last names fall within an alphabetic range. A single letter End value (such as 'B') will not retrieve names that begin with that letter (such as 'Bush') since the names come after the letter alphabetically. Type the next letter after the initial letter of the names(s) you seek, or do not specify an End value. To search for last names that begin with 'Z', leave the End value blank or type 'ZZZZZZZZZZ'. **Note**: The Last Name Begin/End field represents two different fields on the screen (i.e., Last Name Begin and Last Name End).
Actions to be performed	As the user enters the Last Name Begin/End, it is displayed in the textbox in editable format.
User Group (Element Level)	TBD
Validation	None.

SSN Begin/End	
Element	Textbox
Definition/Business Rules	Allow a user to retrieve records for students whose Social Security Numbers fall within a numeric range. An End value containing fewer than nine digits (such as '99') will not retrieve SSNs that begin with that number but contain more digits (such as '990–00–0000'), since the longer number

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SSN Begin/End	
	comes after the shorter one numerically. **Note**: The SSN Begin/End field represents two different fields on the screen (i.e., SSN Begin and SSN End).
Actions to be performed	As the user enters the SSN Begin/End, it is displayed in the textbox in editable format.
User Group (Element Level)	TBD
Validation	None.

Student Designator Begin/End	
Element	Textbox
Definition/Business Rules	Allows a user to retrieve records for students whose designators fall within an alphanumeric range. **Note**: The Student Designator Begin/End field represents two different fields on the screen (i.e., Student Designator Begin and Student Designator End).
Actions to be performed	As the user enters the Student Designator Begin/End, it is displayed in the textbox in editable format.
User Group (Element Level)	TBD
Validation	None.

Certification Date Begin/End	
Element	Textbox
Definition/Business Rules	Allows a user to retrieve records for students who have been certified within a specified date range. The Begin and End values are inclusive; that is, records with a Certification Date equal to the Begin or End date are retrieved, as well as records certified between those two dates. You can use these options to retrieve records of students you have not re-certified for more than a given period of time. If you re-certify a group of students online, you can, at some later time,

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Certification Date Begin/End	
	set the End date equal to the day before the earlier online session to retrieve all the records you did not re-certify in that session. **Note**: The Certification Date Begin/End field represents two different fields on the screen (i.e., Certification Date Begin and Student Designator End).
Actions to be performed	As the user enters the Certification Date Begin/End, it is displayed in the textbox in editable format.
User Group (Element Level)	TBD
Validation	None.

Anticipated Completion Date Begin/End	
Element	Textbox
Definition/Business Rules	Allows a user to retrieve records for students whose Anticipated Completion Date (ACD) falls within a specific date range. The Begin and End values are inclusive; that is, records with an ACD equal to the Begin or End date are retrieved, as well as records with an ACD between those two dates. You can use these options to retrieve all students who are scheduled to graduate at the end of a given semester. **Note**: The Anticipated Completion Date Begin/End field represents two different fields on the screen (i.e., Anticipated Completion Date Begin and Anticipated Completion End).
Actions to be performed	As the user enters the Anticipated Completion Date Begin/End, it is displayed in the textbox in editable format.
User Group (Element Level)	TBD
Validation	None.

Enrollment Code

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Enrollment Code	
Element	Checkbox
Definition/Business Rules	Allows a user to search for records with specific Enrollment Codes. By default, Enrollment Update searches for all Enrollment Codes (i.e., all enrollment code checkboxes are checked). The following enrollment code checkboxes are displayed: A - Approved Leave of Absence H – Half Time or More, But Less Than Full Time D – Deceased L – Less than Half Time F – Full Time W – Withdrawn G – Graduated Z – No Record Found
Actions to be performed	A check appears next to the selected checkbox.
User Group (Element Level)	TBD
Validation	None.

Retrieve	
Element	Pushbutton
Definition/Business Rules	Allows a user to retrieve student information based on the criteria specified in the Primary Search and Advanced Search Options. The Enrollment Maintenance screen displays up to thirty student records at a time. If the search options retrieve more than thirty records, those records will be spread across as many pages as are necessary to display them thirty at a time. Use the Next and Previous buttons to move from page to page. If you do not enter any Primary or Advanced Search Options and accept the default sort on

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Retrieve	
	Student SSN, your organization's entire Student Portfolio displays in SSN order on the Enrollment Maintenance page.
	Advanced Search options are evaluated together with Primary Search options. Neither supersedes the other. This means that if your Primary and Advanced Search Options contradict each other, Enrollment Update will not find any records, even though each individual part of the combination would find and display records. For example, if you select an exact match on Student SSN 111–11–1111 as your Primary Search Option and Student SSNs between 555–55–5555 and **888–88–8888** as your Advanced Search Option, Enrollment Update will not find any records, even though the NSLDS contains enrollment records for a student with SSN 111–11–1111 and for students with SSNs between 555–55–5555 and **888–88–8888**.
	If a user links to the Enrollment Maintenance screen from the Enrollment Update screen, any Advanced Search Options a user sets on Enrollment Update will remain in effect on Enrollment Maintenance. To change them, a user must return to Enrollment Update.
	The following message should be displayed at the top of the Enrollment Update screen:
	Clicking Retrieve will return entire Portfolio in SSN order. All Search values are optional.
Actions to be performed	By clicking on the pushbutton, validation is performed. If there are no errors and students matching the criteria are identified, the Enrollment Maintenance screen displays those students. If there are errors, the appropriate

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Retrieve

	error message is displayed. If there are no errors and no students are found, a message indicating that no records are found.
User Group (Element Level)	TBD
Validation	• *Condition*: Initial Page invocation. *Message*: Clicking Retrieve will return entire Portfolio in SSN order. All Search values are optional. *Location*: Client *Additional Information*: Display Info.gif.
	• *Condition*: No Enrollment roster data found that meets the user specified search criteria. *Message*: No records found for retrieval criteria specified. *Location*: Client *Additional Information*: Display Info.gif.
	• *Condition*: The user has specified Last Name Begin and Last Name End values that are not logically related such that the Begin value is less than the End. *Message:* Please enter a Last Name End value that is greater than the Begin value. *Location*: Client *Additional Information*: None.
	• *Condition*: The user has specified SSN Begin and SSN End values that are not logically related such that the Begin value is less than the End. *Message:* Please enter an SSN End value that is greater than the SSN Begin value. *Location*: Client *Additional Information*: None.
	• *Condition*: The user has specified Student Designator Begin and Student Designator End values that are not logically related such that the Begin value is less than the End. *Message:* Please enter a Student Designator End value that is greater than the Begin value.

Retrieve

| | *Location*: Client
Additional Information: None.

• *Condition*: The user has specified an invalid Certification Date Begin Date.
Message: Please enter Certification Begin Date in MMDDCCYY format.
Location: Client
Additional Information: None.

• *Condition*: The user has specified an invalid Certification Date End Date.
Message: Please enter Certification End Date in MMDDCCYY format.
Location: Client
Additional Information: None.

• *Condition*: The user has specified Certification Date Begin and Certification Date End values that are not logically related such that the Begin value is less than the End.
Message: Please enter a Certification End Date that is greater than the Begin date.
Location: Client
Additional Information: None.

• *Condition*: The user has specified an invalid Anticipated Completion Begin Date.
Message: Please enter Anticipated Completion Begin Date in MMDDCCYY format.
Location: Client
Additional Information: None.

• *Condition*: The user has specified an invalid Anticipated Completion End Date.
Message: Please enter Anticipated Completion End Date in MMDDCCYY format.
Location: Client
Additional Information: None.

• *Condition*: The user has specified Anticipated |

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Retrieve
	Completion Date Begin and Anticipated Completion Date End values that are not logically related such that the Begin value is less than the End. *Message:* Please enter an Anticipated Completion End Date that is greater than the Begin date. *Location:* Client *Additional Information:* None. *Condition:* The user hasn't clicked any of the available Enrollment Codes. *Message:* Please select at least one Enrollment Code for retrieval criteria. *Location:* Client *Additional Information:* None.

3.8 Enrollment Reporting Schedule

Description	Displays a user profile as well as current and past schedules for organizations that report or receive information about the enrollment status of students receiving federal student aid. The current schedule extends one year into the future. The past schedule extends one year into the past.
New or Existing	Existing
User Group (Screen Level)	$EDAGGR, $ED, $GADPC, $GAINQ, $CSC, $SCHSCR, $LENDER, $LENDSV Department of Education (ED) users can view the schedule of any organization involved in the Enrollment Reporting process by entering the organization type and code or name in the Organization Search header that displays for ED users at the top of the Enrollment Reporting Schedule page. Users from other organizations can only view their own organization's schedule.
Requirements Traceability	1.037
Reference(s)	ENRPSC.ASP, WC3A Enrollment Reporting Schedule Server
Business Object	Student, Plus Borrower, School, Servicer, GA, Lender

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3.8.1 Software Unit Logic

ASP File Name:	ENRPSC.asp
Pre-Status:	This screen is accessible from the following screens (depending on user access privileges): • Enrollment Summary (Link: Enrollment Reporting Schedule) • Enrollment Add (Link: Enrollment Reporting Schedule) • Enrollment Update (Link: Enrollment Reporting Schedule) • Enrollment Detail (Link: Enrollment Reporting Schedule) • Enrollment Timeline (Link: Enrollment Reporting Schedule) • Enrollment Maintenance (Link: Enrollment Reporting Schedule) • Student/PLUS Borrower Name Search (Link: Enrollment Reporting Schedule) • Enrollment Reporting Schedule Create (Link: Enrollment Reporting Schedule) • Enrollment Reporting Schedule Create Confirm (Link: Enrollment Reporting Schedule) • Enrollment Reporting Schedule Modify (Link: Enrollment Reporting Schedule) • Menu (Link: Enrollment Reporting Schedule)
Post-Status:	This screen allows a user to navigate to any of the following screens (depending on user access privileges): • Enrollment Summary (Link: Enrollment Summary) • Enrollment Add (Link: Enrollment Add) • Enrollment Update (Link: Enrollment Update) • System Log On (Link: Logoff Icon) • Contact Us (Link: Contact Icon) • Menu (Link: Menu Tab) • Loan History (Link: Aid Tab) • Organization Contact List (Link: Org Tab) • Reports (Link: Reports Tab) • Transfer Monitoring List (Link: Menu Tab) • External Contact List (Link: Support Tab) • Privacy Act (Link: Privacy Act) • Enrollment Reporting Schedule Create (Pushbutton: Create

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	Schedule)
	• Enrollment Reporting Schedule Modify Create (Pushbutton: Modify Schedule)
Gif Name:	The following graphical objects may appear on this screen:
	• Info.gif
	• Help.gif

3.8.2   Design Details

The following screenshot highlights the functionality of the Enrollment Reporting Schedule screen.

Figure 11, Enrollment Reporting Schedule

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3.8.3   Screen Functionality

The following section describes each object on the screen and the functionality behind the object.

Enrollment Summary	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Enrollment Summary screen. This link is deactivated when the user is in the Enrollment Summary screen.
Actions to be performed	When clicked, the Enrollment Summary screen appears.
User Group (Element Level)	TBD
Validation	None.

Enrollment Add	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Enrollment Add screen.
Actions to be performed	When clicked, the Enrollment Add screen appears.
User Group (Element Level)	TBD
Validation	None.

Enrollment Update	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Enrollment Update screen.
Actions to be performed	When clicked, the Enrollment Update screen appears.
User Group (Element Level)	TBD
Validation	None.

Enrollment Reporting Schedule	
Element	Link (Deactivated)
Definition/Business Rules	Allows a user to navigate to the Enrollment Reporting Schedule screen.
Actions to be performed	None.

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Enrollment Reporting Schedule	
User Group (Element Level)	TBD
Validation	None.

Type:	
Element	Dropdown Box
Definition/Business Rules	Allows a user to select a type of organization. The different options are (displayed in this order): • --- Select --- • FDLP SERVICER • ED REGION • GUARANTY AGENCY • LENDER • LENDER BRANCH SERVICER • SCHOOL • STATE AGENCY
Actions to be performed	When the user clicks on the Type Dropdown Box, all the options appear. The "Select" option is highlighted.
User Group (Element Level)	TBD ED users can input this search criteria using the Organization Header search function. Non-ED users cannot input this search criteria. This should be automatically populated and should be in read only format based on the users profile.
Validation	None.

Code:	
Element	Textbox
Definition/Business Rules	Allows a user to enter an organization code. The textbox holds up to 8 characters.
Actions to be performed	As the user enters the organization code, it is displayed in the textbox in editable format.

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Code:	
User Group (Element Level)	TBD ED users can input this search criteria using the Organization Header search function. Non-ED users cannot input this search criteria. This should be automatically populated and should be in read only format based on the users profile.
Validation	None.

Name:	
Element	Textbox
Definition/Business Rules	Allows a user to enter an organization name. The textbox holds up to 45 characters.
Actions to be performed	As the user enters the organization name, it is displayed in the textbox in editable format.
User Group (Element Level)	TBD ED users can input this search criteria using the Organization Header search function. Non-ED users cannot input this search criteria. This should be automatically populated and should be in read only format based on the users profile.
Validation	None.

Retrieve	
Element	Pushbutton
Definition/Business Rules	Allows a user to retrieve enrollment information based on the criteria specified in the Type, Code, and Name textboxes.
Actions to be performed	By clicking on the pushbutton, validation is performed. If there are no errors and students matching the criteria are identified, the Enrollment Reporting Schedule screen is

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Retrieve	
	displayed for the organization. If there are errors, the appropriate error message is displayed. If there are no errors and the organization is not found, the user is navigated to the Organization Search screen.
User Group (Element Level)	TBD
Validation	• *Condition*: No Current Schedule records returned *Message:* No current schedule records were found for this organization. *Location*: Client Additional Information: None. • *Condition*: No Past Schedule records returned *Message:* No past schedule records were found for this organization. *Location*: Client Additional Information: None. • *Condition*: No Current or Past Schedule records returned. *Message:* No current or past schedule records were found for this organization. *Location*: Client Additional Information: None.

Name:	
Element	Label
Definition/Business Rules	Displays the name of the institution whose enrollment information will be displayed.
Actions to be performed	The organization's name is automatically displayed.
User Group (Element Level)	TBD
Validation	None.

Code:	
Element	Label
Definition/Business Rules	Displays the code of the institution whose enrollment information will be displayed.

Code:	
Actions to be performed	The organization's code is automatically displayed.
User Group (Element Level)	TBD
Validation	None.

Type:	
Element	Label
Definition/Business Rules	Displays the type of the institution whose enrollment information will be displayed.
Actions to be performed	The organization's type is automatically displayed.
User Group (Element Level)	TBD
Validation	None.

Create Schedule	
Element	Pushbutton
Definition/Business Rules	Allows a user to navigate to the Enrollment Reporting Schedule Create screen.
Actions to be performed	By clicking on the pushbutton, the Enrollment Reporting Schedule Create screen is displayed.
User Group (Element Level)	TBD
Validation	None.

Modify Schedule	
Element	Pushbutton
Definition/Business Rules	Allows a user to navigate to the Enrollment Reporting Schedule Modify screen.
Actions to be performed	By clicking on the pushbutton, the Enrollment Reporting Schedule Modify screen is displayed.
User Group (Element Level)	TBD
Validation	None.

Distribution Medium	
Element	Label
Definition/Business Rules	Displays how enrollment information is sent to an organization. Valid values are:

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Distribution Medium	
	• Student Aid Internet Gateway (SAIG) • Tape Organizations are assigned User Profile values when they first sign up for the NSLDS. To change a profile value for your organization, contact the Customer Service Center.
Actions to be performed	The Distribution Medium is automatically displayed.
User Group (Element Level)	TBD
Validation	None.

Distribution SAIG User ID	
Element	Label
Definition/Business Rules	Displays the address of the mailbox for organizations that receive enrollment information by the Student Aid Internet Gateway. The organization is assigned a SAIG User ID when they register for a User ID at the SAIG registration website. Organizations are assigned User Profile values when they first sign up for the NSLDS. To change a profile value for your organization, contact the Customer Service Center.
Actions to be performed	The Distribution SAIG User ID is automatically displayed.
User Group (Element Level)	TBD
Validation	None.

Servicer Name	
Element	Label
Definition/Business Rules	Displays the name of the servicer for schools that use a third-party servicer to send enrollment information to NSLDS II.

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Servicer Name	
	Organizations are assigned User Profile values when they first sign up for the NSLDS. To change a profile value for your organization, contact the Customer Service Center.
Actions to be performed	The servicer name is automatically displayed.
User Group (Element Level)	School Users
Validation	None.

Split Files Indicator	
Element	Label
Definition/Business Rules	For schools that use a third-party servicer, a Yes or No option indicating whether the servicer submits enrollment information for all the schools it services as a single file (No) or as a series of separate files (Yes). Organizations are assigned User Profile values when they first sign up for the NSLDS. To change a profile value for your organization, contact the Customer Service Center.
Actions to be performed	The split files indicator is automatically displayed.
User Group (Element Level)	School Users
Validation	None.

Record Format	
Element	Label
Definition/Business Rules	Displays the format in which a guaranty agency, lender, or lender servicer receives enrollment information. Valid values are: • NSLDS Standard • Common Account Maintenance (CAM) Organizations are assigned User Profile values when they first sign up for the NSLDS. To change a profile value for your organization,

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Record Format	
	contact the Customer Service Center.
Actions to be performed	The record format is automatically displayed.
User Group (Element Level)	Non-Schools Users
Validation	None.

Records Received	
Element	Label
Definition/Business Rules	Displays what records a guaranty agency, lender, or lender servicer receives. Valid values are: • *All Records—*All current records regardless of whether they contain any changes since the last Notification file. • *Changes Only—*Only records that contain a change to a value other than Certification Date since the last Notification file. Organizations are assigned User Profile values when they first sign up for the NSLDS. To change a profile value for your organization, contact the Customer Service Center.
Actions to be performed	The record received is automatically displayed.
User Group (Element Level)	Non-Schools Users
Validation	None.

Default Sort Order	
Element	Label
Definition/Business Rules	Displays the sort order the enrollment information is presented. Valid values are: • Student SSN • Student Last Name
Actions to be performed	The Default Sort Order selection is automatically displayed.

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Default Sort Order	
User Group (Element Level)	TBD
Validation	None.

Date (Current Schedule)	
Element	Label
Definition/Business Rules	Displays the date when the NSLDS will send an organization a Student Status Confirmation Report (SSCR) if the organization is a school, or a Notification file if the organization is a guaranty agency, lender, or lender servicer.

Dates are displayed up to one year into the future. |
Actions to be performed	The Date is automatically displayed.
User Group (Element Level)	TBD
Validation	None.

Type (Current Schedule)	
Element	Label
Definition/Business Rules	Displays the type of file that the NSLDS will send the organization. Valid values are:

• *Regular*—A regularly scheduled file. When the NSLDS sends an organization a regular file, it automatically schedules another such file for one year in the future.
• *Ad Hoc*—A file generated for some special reason and not as part of the organization's regular schedule. When NSLDS sends an organization an ad hoc file, it does not automatically schedule another such file for one year in the future.

Type is displayed up to one year into the future. |

Type (Current Schedule)	
Actions to be performed	The Type is automatically displayed.
User Group (Element Level)	TBD
Validation	None.

Created By (Current Schedule)	
Element	Label
Definition/Business Rules	Displays who created or updated the schedule that caused the generation of a particular schedule item and, in parentheses, the date they did it. Valid values are: • *Original Schedule*—Schedule items created when the organization originally signed-up with the NSLDS. • *User Name*—Schedule items created by an online user using the Enrollment Reporting Create or Enrollment Reporting Modify page. Created By is displayed up to one year into the future.
Actions to be performed	The Created By is automatically displayed.
User Group (Element Level)	TBD
Validation	None.

Date (Past Schedule)	
Element	Label
Definition/Business Rules	Displays the date when the NSLDS sent an organization a Student Status Confirmation Report (SSCR) if the organization is a school, or a Notification file if the organization is a guaranty agency, lender, or lender servicer. Dates are displayed up to one year into the past.
Actions to be performed	The Date is automatically displayed.

Date (Past Schedule)	
User Group (Element Level)	TBD
Validation	None.

Type (Past Schedule)	
Element	Label
Definition/Business Rules	Displays the type of file that the NSLDS sent the organization. Valid values are: • *Regular*—A regularly scheduled file. When the NSLDS sends an organization a regular file, it automatically schedules another such file for one year in the future. • *Ad Hoc*—A file generated for some special reason and not as part of the organization's regular schedule. When NSLDS sends an organization an ad hoc file, it does not automatically schedule another such file for one year in the future Type is displayed up to one year into the past.
Actions to be performed	The Type is automatically displayed.
User Group (Element Level)	TBD
Validation	None.

Created By (Past Schedule)	
Element	Label
Definition/Business Rules	Displays who created or updated the schedule that caused the generation of a particular schedule item and, in parentheses, the date they did it. Valid values are: • *Original Schedule*—Schedule items created when the organization originally signed-up with the NSLDS. • *User Name*—Schedule items created by an

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Created By (Past Schedule)	
	online user using the Enrollment Reporting Create or Enrollment Reporting Modify page. Created By is displayed up to one year into the past.
Actions to be performed	The Created By data is automatically displayed.
User Group (Element Level)	TBD
Validation	None.

3.9 Enrollment Reporting Schedule Create

Description	Allows a user to create a new schedule for their organization to receive enrollment status files from the NSLDS II. The Enrollment Reporting Schedule Create Page allows users to delete a school's current SSCR schedule and to create a new schedule for that school. Users supply a Start Date and Frequency that NSLDS uses to calculate the new schedule.
New or Existing	Existing
User Group (Screen Level)	$LENDSV, $LENDER, $SCHSCR, $GADPC
Requirements Traceability	1.038
Reference(s)	ENRPSSCR.ASP, WC3B_ENROLL_REPORT_SCHD_CRT_SRV
Business Object	Student, Plus Borrower, School, Servicer, GA, Lender

3.9.1 Software Unit Logic

ASP File Name:	enrpsccr.asp
Pre-Status:	This screen is accessible from the following screens (depending on user access privileges): • Enrollment Reporting Schedule (Pushbutton: Create

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	Schedule)
Post-Status:	This screen allows a user to navigate to any of the following screens (depending on user access privileges): • Enrollment Summary (Link: Enrollment Summary) • Enrollment Add (Link: Enrollment Add) • Enrollment Update (Link: Enrollment Update) • Enrollment Reporting Schedule (Link: Enrollment Reporting Schedule) • Enrollment Reporting Schedule Create Confirm (Pushbutton: Submit) • System Log On (Link: Logoff Icon) • Contact Us (Link: Contact Icon) • Menu (Link: Menu Tab) • Loan History (Link: Aid Tab) • Organization Contact List (Link: Org Tab) • Reports (Link: Reports Tab) • Transfer Monitoring List (Link: Menu Tab) • External Contact List (Link: Support Tab)
Gif Name:	The following graphical objects may appear on this screen: • Error.gif • Help.gif • Back.gif

3.9.2 Design Details

The following screenshot highlights the functionality of the Enrollment Reporting Schedule Create screen.

Figure 12, Enrollment Reporting Schedule Create

3.9.3   Screen Functionality

The following section describes each object on the screen and the functionality behind the object.

Enrollment Summary	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Enrollment Summary screen. This link is deactivated when the user is in the Enrollment Summary screen.

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Enrollment Summary	
Actions to be performed	When clicked, the Enrollment Summary screen appears.
User Group (Element Level)	TBD
Validation	None.

Enrollment Add	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Enrollment Add screen.
Actions to be performed	When clicked, the Enrollment Add screen appears.
User Group (Element Level)	TBD
Validation	None.

Enrollment Update	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Enrollment Update screen.
Actions to be performed	When clicked, the Enrollment Update screen appears.
User Group (Element Level)	TBD
Validation	None.

Enrollment Reporting Schedule	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Enrollment Reporting Schedule screen.
Actions to be performed	When clicked, the Enrollment Reporting Schedule screen appears.
User Group (Element Level)	TBD
Validation	None.

Type:	
Element	Dropdown Box
Definition/Business Rules	Allows a user to select a type of organization. The different options are (displayed in this order):

Type:	
	• --- Select --- • FDLP SERVICER • ED REGION • GUARANTY AGENCY • LENDER • LENDER BRANCH SERVICER • SCHOOL
Actions to be performed	When the user clicks on the Type Dropdown Box, all the options appear. The "Select" option is highlighted.
User Group (Element Level)	TBD
Validation	None.

Code:	
Element	Textbox
Definition/Business Rules	Allows a user to enter an organization code. The textbox holds up to 8 characters.
Actions to be performed	As the user enters the organization code, it is displayed in the textbox in editable format.
User Group (Element Level)	TBD
Validation	None.

Name:	
Element	Textbox
Definition/Business Rules	Allows a user to enter an organization name. The textbox holds up to 45 characters.
Actions to be performed	As the user enters the organization name, it is displayed in the textbox in editable format.
User Group (Element Level)	TBD
Validation	None.

Retrieve	
Element	Pushbutton
Definition/Business Rules	Allows a user to retrieve enrollment information based on the criteria specified in the Type, Code,

Retrieve	
	and Name textboxes.
Actions to be performed	By clicking on the pushbutton, validation is performed. If there are no errors and the organization matching the criteria is identified, the Enrollment Report Schedule Create screen is displayed. If there are errors, the appropriate error message is displayed. If there are no errors and the organization is not found, the user is directed to the Organization Search screen.
User Group (Element Level)	TBD
Validation	TBD

Return to Enrollment Reporting Schedule	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Enrollment Reporting Schedule screen.
Actions to be performed	When clicked, the Enrollment Reporting Schedule screen appears.
User Group (Element Level)	TBD
Validation	None.

Name:	
Definition/Business Rules	Displays the name of the institution whose enrollment information will be displayed.
Actions to be performed	The name of the organization is automatically displayed.
User Group (Element Level)	TBD
Validation	None.

Code:	
Element	Label
Definition/Business Rules	Displays the code of the institution whose enrollment information will be displayed.
Actions to be performed	The code of the organization is automatically displayed.
User Group (Element Level)	TBD
Validation	None.

Type:	
Element	Label
Definition/Business Rules	Displays the type of the institution whose enrollment information will be displayed.
Actions to be performed	The type of the organization is automatically displayed.
User Group (Element Level)	TBD
Validation	None.

Start Date:	
Element	Textbox
Definition/Business Rules	Allows a user to enter the start date for the enrollment reporting schedule. The date must be entered in the MMDDCCYY format. The start date can be any valid date greater than or equal to the current date and less than or equal to the current date plus one year.
Actions to be performed	As the user enters the Start Date, it is displayed in the textbox in editable format.
User Group (Element Level)	TBD
Validation	None.

Frequency:	
Element	Dropdown Box
Definition/Business Rules	Allows a user to select the frequency for the enrollment reporting schedule. The following values may be displayed: • Default • Weekly • Every Two Weeks • Monthly • Every Two Months • Every Three Months

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Frequency:

| | • Every Four Months
• Twice a Year

Valid frequencies for schools are as follows:

• Every Week
• Every Two Weeks
• Every Month
• Every Two Months
• Every Three Months
• Every Four Months
• Every Six Months

Valid frequencies for guaranty agencies, lenders, and lender servicers are as follows:

• Every Day
• Every Week

Default frequencies are every two months for schools and weekly for all other organizations. The following permutations are possible:

• If a school does not type a start date and selects a default frequency, rosters are scheduled for the first day of every other month, and the months are odd or even depending on the school's type.

• If a school types a start date and selects a default frequency, rosters are scheduled every other month starting on the date selected by the school.

• If a non-school organization does not type a start date and selects a default frequency, Notification files are scheduled for Monday every week. |

Frequency:	
	• If a non-school organization types a start date and selects a default frequency, rosters are scheduled weekly starting on the date selected by the non-school organization.
Actions to be performed	When the user clicks on the Frequency Dropdown Box, all the options appear.
User Group (Element Level)	TBD
Validation	None.

Default Sort Order:	
Element	Dropdown Box
Definition/Business Rules	Allows a user to select the order the enrollment information is displayed. The following valid values apply: • Student Last Name • Student SSN
Actions to be performed	When the user clicks on the Default Sort Order Dropdown Box, all the options appear.
User Group (Element Level)	TBD
Validation	None.

Submit	
Element	Pushbutton
Definition/Business Rules	Allows a user to submit the criteria selected in the Start Date, Frequency, and Default Sort Order fields.
Actions to be performed	By clicking on the pushbutton, validation is performed. If there are no errors, the Enrollment Reporting Schedule Create Confirm screen displays the new schedule and asks you to confirm it. If there are errors, the appropriate error message is displayed.
User Group (Element Level)	TBD
Validation	• *Condition:* User entered an invalid start date *Message: Please* enter a valid Start Date in MMDDCCYY format.

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Submit
Location: Client *Additional Information:* Display error.gif. • *Condition:* Start Date must be greater or equal to current date if the Start Date and/or Frequency have been changed *Message:* Please enter a valid Start Date greater than or equal to the current date MDDCCYY format. *Location:* Client *Additional Information:* Display error.gif. • *Condition:* Empty Start Date when frequency equals something other than Default *Message:* Please enter a valid Start Date when not using the Default Frequency. *Location:* Client *Additional Information:* Display error.gif. • *Condition:* A non-school has entered a start date more than 1 week in the future *Message:* Please enter an earlier date. No more than 1 week can elapse between Regular schedule items. *Location:* Client *Additional Information:* Display error.gif.

Date (Current Schedule)	
Element	Label
Definition/Business Rules	Displays the date when the NSLDS will send an organization a Student Status Confirmation Report (SSCR) if the organization is a school, or a Notification file if the organization is a guaranty agency, lender, or lender servicer. Dates are displayed up to one year into the future.
Actions to be performed	The Date is automatically displayed.
User Group (Element Level)	TBD
Validation	None.

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Type (Current Schedule)	
Element	Label
Definition/Business Rules	Displays the type of file that the NSLDS will send the organization. Valid values are: • *Regular—*A regularly scheduled file. When the NSLDS sends an organization a regular file, it automatically schedules another such file for one year in the future. • *Ad Hoc—*A file generated for some special reason and not as part of the organization's regular schedule. When NSLDS sends an organization an ad hoc file, it does not automatically schedule another such file for one year in the future. Type is displayed up to one year into the future.
Actions to be performed	The Type is automatically displayed.
User Group (Element Level)	TBD
Validation	None

Created By (Current Schedule)	
Element	Label
Definition/Business Rules	Displays who created or updated the schedule that caused the generation of a particular schedule item and, in parentheses, the date they did it. Valid values are: • *Original Schedule—*Schedule items created when the organization originally signed-up with the NSLDS. • *User Name—*Schedule items created by an online user using the Enrollment Reporting Create or Enrollment Reporting Modify page.

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Created By (Current Schedule)	
	Created By is displayed up to one year into the future.
Actions to be performed	The Created By data is automatically displayed.
User Group (Element Level)	TBD
Validation	None.

3.10 Enrollment Reporting Schedule Create Confirm

Description	Allows a user to confirm the new enrollment reporting schedule.
New or Existing	Existing
User Group (Screen Level)	$LENDSV, $LENDER, $SCHSCR, $GADPC
Requirements Traceability	1.036, 1.037, 1.039
Reference(s)	ENROLUPSR.ASP, WC30 Enrollment Maintenance Retrieval Server
Business Object	Student, Plus Borrower, School, Servicer, GA, Lender

3.10.1 Software Unit Logic

ASP File Name:	enrpsccr.asp
Pre-Status:	This screen is accessible from the following screens (depending on user access privileges): • Enrollment Reporting Schedule Create
Post-Status:	This screen allows a user to navigate to any of the following screens (depending on user access privileges): • Enrollment Summary (Link: Enrollment Summary) • Enrollment Add (Link: Enrollment Add) • Enrollment Update (Link: Enrollment Update) • Enrollment Reporting Schedule (Link: Enrollment Reporting Schedule, Pushbutton: Confirm) • Enrollment Reporting Schedule Create (Pushbutton:

	Cancel)
	• System Log On (Link: Logoff Icon)
	• Contact Us (Link: Contact Icon)
	• Menu (Link: Menu Tab)
	• Loan History (Link: Aid Tab)
	• Organization Contact List (Link: Org Tab)
	• Reports (Link: Reports Tab)
	• Transfer Monitoring List (Link: Menu Tab)
	• External Contact List (Link: Support Tab)
Gif Name:	The following graphical objects may appear on this screen:
	• Error.gif
	• Help.gif
	• Back.gif

3.10.2 Design Details

The following screenshot highlights the functionality of the Enrollment Reporting Schedule Create Confirm screen.

Figure 13, Enrollment Reporting Schedule Create Confirm

3.10.3 Screen Functionality

The following section describes each object on the screen and the functionality behind the object.

Enrollment Summary	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Enrollment

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Enrollment Summary	
	Summary screen. This link is deactivated when the user is in the Enrollment Summary screen.
Actions to be performed	When clicked, the Enrollment Summary screen appears.
User Group (Element Level)	TBD
Validation	None.

Enrollment Add	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Enrollment Add screen.
Actions to be performed	When clicked, the Enrollment Add screen appears.
User Group (Element Level)	TBD
Validation	None.

Enrollment Update	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Enrollment Update screen.
Actions to be performed	When clicked, the Enrollment Update screen appears.
User Group (Element Level)	TBD
Validation	None.

Enrollment Reporting Schedule	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Enrollment Reporting Schedule screen.
Actions to be performed	When clicked, the Enrollment Reporting Schedule screen appears.
User Group (Element Level)	TBD
Validation	None.

Type:	
Element	Dropdown Box
Definition/Business Rules	Allows a user to select a type of organization.

Type:	
	The different options are (displayed in this order): • --- Select --- • FDLP SERVICER • ED REGION • GUARANTY AGENCY • LENDER • LENDER BRANCH SERVICER • SCHOOL
Actions to be performed	When the user clicks on the Type Dropdown Box, all the options appear. The "Select" option is highlighted.
User Group (Element Level)	TBD
Validation	None.

Code:	
Element	Textbox
Definition/Business Rules	Allows a user to enter an organization code. The textbox holds up to 8 characters.
Actions to be performed	As the user enters the organization code, it is displayed in the textbox in editable format.
User Group (Element Level)	TBD
Validation	None.

Name:	
Element	Textbox
Definition/Business Rules	Allows a user to enter an organization name. The textbox holds up to 45 characters.
Actions to be performed	As the user enters the organization name, it is displayed in the textbox in editable format.
User Group (Element Level)	TBD
Validation	None.

Retrieve

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Retrieve	
Element	Pushbutton
Definition/Business Rules	Allows a user to retrieve enrollment information based on the criteria specified in the Type, Code, and Name textboxes.
Actions to be performed	By clicking on the pushbutton, validation is performed. If there are no errors and the organization matching the criteria is identified, the Enrollment Reporting Schedule Create screen is displayed. If there are errors, the appropriate error message is displayed.
User Group (Element Level)	TBD
Validation	

Return to Enrollment Reporting Schedule	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Enrollment Reporting Schedule screen.
Actions to be performed	When clicked, the Enrollment Reporting Schedule screen appears.
User Group (Element Level)	TBD
Validation	None.

Name:	
Definition/Business Rules	Displays the name of the institution whose enrollment information will be displayed.
Actions to be performed	The name of the organization is automatically displayed.
User Group (Element Level)	TBD
Validation	None.

Code:	
Element	Label
Definition/Business Rules	Displays the code of the institution whose enrollment information will be displayed.
Actions to be performed	The code of the organization is automatically displayed.
User Group (Element Level)	TBD

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Code:	
Validation	None.

Type:	
Element	Label
Definition/Business Rules	Displays the type of the institution whose enrollment information will be displayed.
Actions to be performed	The type of the organization is automatically displayed.
User Group (Element Level)	TBD
Validation	None.

Start Date:	
Element	Label
Definition/Business Rules	Displays the selected start date.
Actions to be performed	The start date automatically displayed.
User Group (Element Level)	TBD
Validation	None.

Frequency:	
Element	Label
Definition/Business Rules	Displays the selected frequency.
Actions to be performed	The frequency automatically displayed.
User Group (Element Level)	TBD
Validation	None.

Default Sort Order:	
Element	Label
Definition/Business Rules	Displays the selected default sort order.
Actions to be performed	The default sort order is automatically displayed.
User Group (Element Level)	TBD
Validation	None.

Date	
Element	Label

Date	
Definition/Business Rules	Displays the new enrollment schedule dates (up to one year in the future).
Actions to be performed	The date is automatically displayed.
User Group (Element Level)	TBD
Validation	None.

Type	
Element	Label
Definition/Business Rules	Displays the type of file that NSLDS II will send.
Actions to be performed	The type is automatically displayed.
User Group (Element Level)	TBD
Validation	None.

Confirm	
Element	Pushbutton
Definition/Business Rules	Allows a user to **delete the existing schedule and replace it with the new schedule.**
Actions to be performed	By clicking on the pushbutton, the new schedule is accepted. A confirmation message notifying the user of a successful schedule creation appears in the Enrollment Reporting Schedule screen.
User Group (Element Level)	TBD
Validation	None.

Cancel	
Element	Pushbutton
Definition/Business Rules	Allows a user to cancel the new schedule request.
Actions to be performed	By clicking on the pushbutton, the new schedule is cancelled. The user is returned to the Enrollment Reporting Schedule Create screen.
User Group (Element Level)	TBD
Validation	None.

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3.11 Enrollment Reporting Schedule Modify

Description	Allows a user to modify their organization's current schedule for receiving enrollment status files from NSLDS II. Users can change dates, change schedule types (regular or Ad Hoc), cancel dates, and add new dates. At any point prior to submittal a user can reset the data by clicking the reset button.
New or Existing	Existing
User Group (Screen Level)	$EDAGGR, $GADPC, $SCHSCR, $LENDER, $LENDSV
Requirements Traceability	1.040
Reference(s)	ENRPSCMD.ASP, WC3C_ENROLL_REPORT_SCHD_MOD_SRV
Business Object	Student, Plus Borrower, School, Servicer, GA, Lender

3.11.1 Software Unit Logic

ASP File Name:	enrpscmd.asp
Pre-Status:	This screen is accessible from the following screens (depending on user access privileges): • Enrollment Reporting Schedule (Pushbutton: Modify Schedule)
Post-Status:	This screen allows a user to navigate to any of the following screens (depending on user access privileges): • Enrollment Summary (Link: Enrollment Summary) • Enrollment Add (Link: Enrollment Add) • Enrollment Update (Link: Enrollment Update) • Enrollment Reporting Schedule (Link: Enrollment Reporting Schedule) • System Log On (Link: Logoff Icon) • Contact Us (Link: Contact Icon) • Menu (Link: Menu Tab) • Loan History (Link: Aid Tab) • Organization Contact List (Link: Org Tab)

	• Reports (Link: Reports Tab) • Transfer Monitoring List (Link: Menu Tab) • External Contact List (Link: Support Tab)
Gif Name:	The following graphical objects may appear on this screen: • Error.gif • Help.gif • Back.gif

3.11.2 Design Details

The following screenshot highlights the functionality of the Enrollment Reporting Schedule Create Modify screen.

Figure 14, Enrollment Reporting Schedule Modify

3.11.3 Screen Functionality

The following section describes each object on the screen and the functionality behind the object.

Enrollment Summary	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Enrollment

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Enrollment Summary	
	Summary screen. This link is deactivated when the user is in the Enrollment Summary screen.
Actions to be performed	When clicked, the Enrollment Summary screen appears.
User Group (Element Level)	TBD
Validation	None.

Enrollment Add	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Enrollment Add screen.
Actions to be performed	When clicked, the Enrollment Add screen appears.
User Group (Element Level)	TBD
Validation	None.

Enrollment Update	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Enrollment Update screen.
Actions to be performed	When clicked, the Enrollment Update screen appears.
User Group (Element Level)	TBD
Validation	None.

Enrollment Reporting Schedule	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Enrollment Reporting Schedule screen.
Actions to be performed	When clicked, the Enrollment Reporting Schedule screen appears.
User Group (Element Level)	TBD
Validation	None.

Type:	
Element	Dropdown Box
Definition/Business Rules	Allows a user to select a type of organization.

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Type:	
	The different options are (displayed in this order): • --- Select --- • FDLP SERVICER • ED REGION • GUARANTY AGENCY • LENDER • LENDER BRANCH SERVICER • SCHOOL
Actions to be performed	When the user clicks on the Type Dropdown Box, all the options appear. The "Select" option is highlighted.
User Group (Element Level)	TBD
Validation	None.

Code:	
Element	Textbox
Definition/Business Rules	Allows a user to enter an organization code. The textbox holds up to 8 characters.
Actions to be performed	As the user enters the organization code, it is displayed in the textbox in editable format.
User Group (Element Level)	TBD
Validation	None.

Name:	
Element	Textbox
Definition/Business Rules	Allows a user to enter an organization name. The textbox holds up to 45 characters.
Actions to be performed	As the user enters the organization name, it is displayed in the textbox in editable format.
User Group (Element Level)	TBD
Validation	None.

Retrieve	
Element	Pushbutton

Retrieve	
Definition/Business Rules	Allows a user to retrieve enrollment information based on the criteria specified in the Type, Code, and Name textboxes.
Actions to be performed	By clicking on the pushbutton, validation is performed. If there are no errors, the Enrollment Reporting Modify Confirm screen is displayed. If there are errors, the appropriate error message is displayed. If there are no errors and the organization is not found, the user is directed to the Organization Search screen.
User Group (Element Level)	TBD
Validation	

Return to Enrollment Reporting Schedule	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Enrollment Reporting Schedule screen.
Actions to be performed	When clicked, the Enrollment Reporting Schedule screen appears.
User Group (Element Level)	TBD
Validation	None.

Name:	
Definition/Business Rules	Displays the name of the institution whose enrollment information will be displayed.
Actions to be performed	The name of the organization is automatically displayed.
User Group (Element Level)	TBD
Validation	None.

Code:	
Element	Label
Definition/Business Rules	Displays the code of the institution whose enrollment information will be displayed.
Actions to be performed	The code of the organization is automatically displayed.
User Group (Element Level)	TBD

Code:	
Validation	None.

Type:	
Element	Label
Definition/Business Rules	Displays the type of the institution whose enrollment information will be displayed.
Actions to be performed	The type of the organization is automatically displayed.
User Group (Element Level)	TBD
Validation	None.

Distribution Medium	
Element	Label
Definition/Business Rules	Displays how enrollment information is sent to an organization. Valid values are: • Student Aid Internet Gateway (SAIG) • Tape
Actions to be performed	The Distribution Medium is automatically displayed.
User Group (Element Level)	TBD
Validation	None.

Distribution SAIG User ID	
Element	Label
Definition/Business Rules	Displays the address of the mailbox for organizations that receive enrollment information by the Student Aid Internet Gateway.
Actions to be performed	The Distribution SAIG User ID is automatically displayed.
User Group (Element Level)	TBD
Validation	None.

Servicer Name	
Element	Label
Definition/Business Rules	Displays the name of the servicer for schools that

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Servicer Name	
	use a third-party servicer to send enrollment information to NSLDS.
Actions to be performed	None.
User Group (Element Level)	Schools
Validation	None.

Split Files Indicator	
Element	Label
Definition/Business Rules	For schools that use a third-party servicer, a Yes or No option indicating whether the servicer submits enrollment information for all the schools it services as a single file (No) or as a series of separate files (Yes).
Actions to be performed	None.
User Group (Element Level)	Schools
Validation	TBD

Default Sort Order	
Element	Label
Definition/Business Rules	Displays the sort order the enrollment information is presented. Valid values are: • Student SSN • Student Last Name
Actions to be performed	The Default Sort Order selection is automatically displayed.
User Group (Element Level)	TBD School users who aren't serviced by a Servicer can select the sort order of their roster generation.
Validation	None.

Add blank line	
Element	Pushbutton
Definition/Business Rules	Allows a user to add a blank line.
Actions to be performed	By clicking on the pushbutton, a blank line appears with the date, type, and cancel fields.

Add blank line	
User Group (Element Level)	TBD
Validation	None.

Most recently generated scheduled file: 09/01/2002	
Element	Label
Definition/Business Rules	Displays the most recently generated SSCR file.
Actions to be performed	The label automatically appears with the latest SSCR generated date.
User Group (Element Level)	TBD
Validation	None.

Date	
Element	Label
Definition/Business Rules	Allows a user to enter or modify a date.
Actions to be performed	As the user enters the Date, it is displayed in the textbox in editable format.
User Group (Element Level)	TBD
Validation	None.

Type	
Element	Dropdown Box
Definition/Business Rules	Allows a user to select the type of enrollment file request.
Actions to be performed	As the user enters the Type, it is displayed in the textbox in editable format.
User Group (Element Level)	TBD
Validation	None.

Cancel	
Element	Checkbox
Definition/Business Rules	Allows a user to select or deselect a date.
Actions to be performed	A check will be displayed if the user clicks on the box.
User Group (Element Level)	TBD
Validation	None.

Submit

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Submit	
Element	Pushbutton
Definition/Business Rules	Allows a user to submit their modified schedule. Once submitted, dates and schedules are validated and any irregularities result in a redisplay of the update page with the errors flagged and the details of the error available through a mouse-over of the error icon. When all errors have been corrected and the data passes validation at the server, the new schedule will be displayed in a protected mode to the user for confirmation.
Actions to be performed	By clicking on the pushbutton, validation is performed. If there are no errors, the Enrollment Reporting Schedule Modify Confirm screen displays the new schedule and asks you to confirm it. If there are errors, the appropriate error message is displayed.
User Group (Element Level)	TBD
Validation	TBD

Reset	
Element	Pushbutton
Definition/Business Rules	Allows a user to reset their changes to its initial state.
Actions to be performed	By clicking on the pushbutton, the modified schedule is returned to its initial state.
User Group (Element Level)	TBD
Validation	None.

3.12 Enrollment Reporting Schedule Modify Confirm

Description	Allows a user to confirm the modification of the new enrollment reporting schedule.
New or Existing	Existing
User Group (Screen Level)	$LENDSV, $LENDER, $SCHSCR, $GADPC

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Requirements Traceability	1.040
Reference(s)	ENRPSCMD.ASP, WC3C_ENROLL_REPORT_SCHD_MOD_SRV
Business Object	Student, Plus Borrower, School, Servicer, GA, Lender

3.12.1 Software Unit Logic

ASP File Name:	enrpsccr.asp
Pre-Status:	This screen is accessible from the following screens (depending on user access privileges): • Enrollment Reporting Schedule Modify (Pushbutton: Submit)
Post-Status:	This screen allows a user to navigate to any of the following screens (depending on user access privileges): • Enrollment Summary (Link: Enrollment Summary) • Enrollment Add (Link: Enrollment Add) • Enrollment Update (Link: Enrollment Update) • Enrollment Reporting Schedule (Link: Enrollment Reporting Schedule) • System Log On (Link: Logoff Icon) • Contact Us (Link: Contact Icon) • Menu (Link: Menu Tab) • Loan History (Link: Aid Tab) • Organization Contact List (Link: Org Tab) • Reports (Link: Reports Tab) • Transfer Monitoring List (Link: Menu Tab) • External Contact List (Link: Support Tab)
Gif Name:	The following graphical objects may appear on this screen: • Error.gif • Help.gif • Back.gif

3.12.2 Design Details

The following screenshot highlights the functionality of the Enrollment Reporting Schedule Create Confirm screen.

Figure 15, Enrollment Reporting Schedule Modify Confirm

3.12.3 Screen Functionality

The following section describes each object on the screen and the functionality behind the object.

Enrollment Summary	
Element	Link

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Enrollment Summary	
Definition/Business Rules	Allows a user to navigate to the Enrollment Summary screen. This link is deactivated when the user is in the Enrollment Summary screen.
Actions to be performed	When clicked, the Enrollment Summary screen appears.
User Group (Element Level)	TBD
Validation	None.

Enrollment Add	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Enrollment Add screen.
Actions to be performed	When clicked, the Enrollment Add screen appears.
User Group (Element Level)	TBD
Validation	None.

Enrollment Update	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Enrollment Update screen.
Actions to be performed	When clicked, the Enrollment Update screen appears.
User Group (Element Level)	TBD
Validation	None.

Enrollment Reporting Schedule	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Enrollment Reporting Schedule screen.
Actions to be performed	When clicked, the Enrollment Reporting Schedule screen appears.
User Group (Element Level)	TBD
Validation	None.

Return To Enrollment Reporting Schedule	
Element	Link

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Return To Enrollment Reporting Schedule	
Definition/Business Rules	Allows a user to navigate to the Enrollment Reporting Schedule screen.
Actions to be performed	When clicked, the Enrollment Reporting Schedule screen appears.
User Group (Element Level)	TBD
Validation	None.

Name:	
Definition/Business Rules	Displays the name of the institution whose enrollment information will be displayed.
Actions to be performed	The name of the organization is automatically displayed.
User Group (Element Level)	TBD
Validation	None.

Code:	
Element	Label
Definition/Business Rules	Displays the code of the institution whose enrollment information will be displayed.
Actions to be performed	The code of the organization is automatically displayed.
User Group (Element Level)	TBD
Validation	None.

Type:	
Element	Label
Definition/Business Rules	Displays the type of the institution whose enrollment information will be displayed.
Actions to be performed	The type of the organization is automatically displayed.
User Group (Element Level)	TBD
Validation	None.

Date	
Element	Label
Definition/Business Rules	Allows a user to view the date.
Actions to be performed	None.

Date	
User Group (Element Level)	TBD
Validation	None.

Type	
Element	Label
Definition/Business Rules	Allows a user to view the type.
Actions to be performed	None.
User Group (Element Level)	TBD
Validation	None.

Confirm	
Element	Pushbutton
Definition/Business Rules	Allows a user to confirm the new schedule.
Actions to be performed	By clicking on the pushbutton, the new schedule is accepted. A confirmation message notifying the user of a successful schedule creation appears in the Enrollment Reporting Schedule screen.
User Group (Element Level)	TBD
Validation	None.

Cancel	
Element	Pushbutton
Definition/Business Rules	Allows a user to cancel the new schedule request.
Actions to be performed	By clicking on the pushbutton, the new schedule is cancelled. The user is returned to the Enrollment Reporting Schedule Modify screen.
User Group (Element Level)	TBD
Validation	None.

4   Appendix A – Screens Global Attributes

5 Appendix B – User Interface Inventory Matrix